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## ABSTRACT

This document examines many of the issues surrounding school choice. It summarizes the prevalence of school choice and touches on elements of the debate, such as the dilemma in finding the right balance between individual/family freedom and the interests of the community. In looking at school-choice options, the paper divides them into intrasectional (public) choice plans and intersectional choice plans. One example of an intrasectional or intradistrict plan is the magnet school, which is the most prevalent instrument of choice. Other types of intrasectional options include controlled-choice plans, charter schools, and contract schools. Plans that can be classified as intersectional choice plans include public voucher plans, as well as private voucher and scholarship plans. These plans allow students to attend schools in different districts, and various examples of where these plans have been tried are discussed. Other "choice" plans that are discussed are homeschooling, virtual schools, and alternative schools. The document describes how these various plans serve minority and disadvantaged students, looks at community and parental satisfaction, outlines some successful programs along with student achievement, evaluates tax credits and legislation, and lists some unfavorable outcomes associated with different school-choice options. (Contains approximately 300 references.) (RJM)

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## **Trends and Issues School Choice**

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# Trends and Issues

## School Choice

*Compiled by Margaret Hadderman, research analyst. Stuart Smith also contributed to this report.*

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## Introduction

Since the late 1980s, school choice has become a popular, if controversial strategy for reforming American education and equalizing educational opportunities. Parents who select the school their child attends have various reasons for doing so, "including academic, religious, or moral environment and convenience" (National Center for Educational Statistics 1997). Although research suggests that most parents, if given a choice, would prefer their neighborhood schools (Rose and Gallup 1999), the school-choice movement is gaining momentum.

## **The Prevalence of Choice**

Currently, thirty-six states and the District of Columbia have charter-school legislation. Publicly supported voucher programs are operating in Cleveland, Milwaukee, and some rural Vermont and New Hampshire counties; at least thirty-one cities are offering privately supported vouchers or scholarships to needy students (Miller 1999). Additionally, more parents are home-schooling their children, and a growing number of for-profit companies are contracting with public school districts to manage instructional services and entire schools.

By the early 1990s, school choice was serving a wide spectrum of income and minority groups, according to a survey by the National Center for Education Statistics (1997). In 1993, 20 percent of students in grades 3 to 12 were enrolled in schools chosen by their parents; 11 percent attended public schools and 9 percent attended private schools. Also, 39 percent of parents whose children attended assigned schools claimed their choice of residence was influenced by school-quality considerations. Higher family income, according to this report, enhanced both public- and private-school choice.

Although students from affluent families were more likely to attend a chosen school than those from poor families, black students were more likely than whites to attend a school selected by their parents. Of these students, blacks were more likely to attend a public school than whites. Parents whose children were enrolled in chosen private or public schools were more likely to be satisfied with these schools' programs than were parents whose children attended assigned public schools (National Center for Education Statistics 1997).

According to a 1999 NCES survey of parents with school-age children, about 25 percent of K-12 students were not attending neighborhood schools during the 1999-2000 academic year (Schnaiberg 1999).

Between 1993 and 1996, the number of K-12 students attending some form of public-choice school grew by 1.4 million, from 5.3 million to 6.7 million. Public-choice students composed 13 percent of all enrollments. Private-school enrollment grew by 800,000, from 4.4 million to 5.2 million students, and composed 10 percent of all enrollments (Schnaiberg 1999).

During the 1999-2000 school year, public-choice enrollment is expected to reach 15 percent of all enrollment, with private-school enrollment staying at 10 percent (Schnaiberg 1999).

## **The School-Choice Debate**

The national debate over school choice has stimulated both a discussion about the best way to improve schools and a philosophical conversation concerning values, identity, and freedom (Cookson 1992). One reason school choice is so controversial is that it addresses

a traditional American dilemma: What is the correct balance between individual/family freedom and the rights of the community?

The issue centers on defining the nature of the relationship between a government and its people and asks how a (democratic) government should fulfill a generally accepted responsibility. Should the marketplace be used in pursuit of a common public goal—education of a citizenry?

School choice is not new to American education. Many Catholic families long ago abandoned secular schools, and wealthy parents have traditionally sent their children to private prep schools. Choice is also manifest in parents' residential choices, their selection of day-care facilities, and their use of knowledge and social connections to secure certain teachers or programs for their children. In all cases, "choices are shaped by the wealth, ethnicity, and social status of parents and their neighborhoods" (Elmore and Fuller 1996).

## **School-Choice Options**

As the remaining sections show, choice cannot be easily contained in any one policy, proposal, or format. There are many choice options, and there is considerable disagreement about which forms are best or most appropriate. Discussion focuses on recent developments in (1) intrasectional choice (forms excluding private schools): magnet schools, intra- and inter-district controlled-choice plans, charter schools, and contracted schools; (2) intersectional choice (forms including private schools): vouchers, tax credits, and scholarships; (3) alternative schools; and (4) home schooling.

### **Intrasectional (Public) Choice Plans**

#### **Magnet Schools**

A type of intradistrict plan, magnet schools are thematic islands of choice within a traditional district-assignment or controlled-choice plan. Each magnet school subscribes to a particular educational philosophy or curricular specialty, drawing students who share that interest. Operating in an open-enrollment context, magnet schools have been used to desegregate urban schools in the North. Magnets emerged first in Milwaukee and Cincinnati during the 1970s, spreading to both northern and southern cities in subsequent decades (Elmore and Fuller 1996).

Currently, magnets are the most prevalent instrument of choice. During 1991-92, districts across the country operated 2,400 magnet schools and 3,200 individual magnet programs. At that time, 1.2 million students participated in magnet programs, boosted by over \$739 million in implementation support (Steel and Levine 1994). As of 1996, more than 1.5 million youngsters attended magnet schools and over 120,000 were on waiting lists (Black 1996).

Although the primary focus of magnet schools may be shifting from "desegregating schools to creating schools with high interest, motivation, and learning for students and with support and satisfaction for parents," their survival depends on serving diverse student populations effectively (Black 1996).

The following sections summarize research findings that point to positive effects of magnet schools. A subsequent section looks at less favorable findings.

### **Services to Minority and Disadvantaged Students**

Several studies document magnet schools' effectiveness in reducing racial isolation and providing high-quality educational programs (Black 1996). A 1994 study of eleven magnet school campuses in Federal Region F (including Arkansas, Louisiana, New Mexico, Oklahoma, and Texas) suggested that magnet schools represent a viable alternative for creating schools that benefit all students, regardless of race, sex, or national origin (Scott and DeLuna 1994). The study recommended that nonmagnet schools adopt the promising practices of these "pockets of excellence" to meet students' twenty-first-century educational needs.

The same conclusion was reached in a more recent report by the Citizens' Commission on Civil Rights (1997), which studied districts in three communities (St. Louis, Cincinnati, and Nashville) that made wide use of magnets and a special interdistrict city-to-suburb transfer program. This study found that magnet schools (and the transfer program) encouraged desegregation and met the test of serving poor children more effectively than the schools they previously attended, and therefore should be greatly expanded.

In another study that tracked 4,000 urban students from eighth through tenth grade, Adam Gamoran (1996) concluded that students attending magnet schools learn more than those enrolled in comprehensive high schools and in Catholic and secular private schools. According to Gamoran, students at magnet schools "made the greatest gains in reading, social studies, and science." Students in comprehensive high schools had the lowest scores in these three subjects and math.

### **School Community and Parental Satisfaction**

A study of teacher self-reports comparing indicators of school community in three whole-school dedicated magnets and four program-within-school magnets (with only partial student participation) in the Nashville Public Schools found that whole-school magnets were characterized by higher levels of internal and external community (Hausman and Goldring, March 2000).

The same researchers investigated relationships between urban parents' reasons for choosing magnet schools and their degree of satisfaction, involvement, and influence in the schools (June 2000). Parents selected schools for numerous reasons, and they seemed highly satisfied with their choices; those choosing for value reasons were most likely to be involved and satisfied with their children's schools.

## Successful Career Magnet Programs

Three student surveys, including two studies that compared graduates of magnet programs with graduates of comprehensive, urban high schools, suggests that magnets can positively influence high school graduates' social development and educational/occupational aspirations. Two long-term studies also confirm the academies' suitability for high-risk and other youth.

In a study that interviewed 20-year-old graduates of 110 career-magnet programs, these graduates were found to smoke and drink less, study more, and take their lives more seriously than do graduates of comprehensive high schools (Crain and others 1999). The former were also more likely to say parents would support them for college, believe they would be pursuing their chosen career within the next 6-10 years, and have friends with career interests. Career magnets created a climate to help young people acquire the social capital (and adult influences) needed for career development (Flaxman and others 1997).

Similarly, a survey of 336 graduates of a large urban high school showed that graduates from magnet programs had significantly higher educational aspirations than did nonmagnet program graduates (Bank and Spencer 1997). Results suggest that magnets' positive effects on educational outcomes may be indirect ones, due to increases in self-esteem resulting from being a "special student in a special school." Bank and Spencer expect achievement to increase in the years following graduation.

A survey of juniors and seniors attending California's innovative New Technology High School (funded partly by business partnerships) was overwhelmingly positive (Van Buren 2000). Students were favorably impressed by the school's high-tech, business-friendly ambience and believed strongly that their learning experiences would position them advantageously for college and career success.

Charles Dayton, a researcher who evaluated California's first 10 career academies and is now coordinator of the Career Academy Support Network, is impressed with academies' progress over the past two decades (Gehring 2000). The state now has "240 career academies financed by state grants and about the same number that operate without state support." Altogether these academies serve 20,000 students, and Governor Gray Davis has proposed funding for 50 more academies.

The Manpower Demonstration Corporation's study of nine career academies around the nation that serve predominantly high-risk, Hispanic, and African-American students revealed modest, but encouraging findings (Gehring 2000). Career-academy attendees did not necessarily improve test scores, but did improve attendance and were more likely to stay in school and graduate on time than students enrolled in comprehensive high schools.

According to three experts (Porter and others 2001), career academies are gaining in popularity "because they prepare high-school students for both college and the workplace." Students are "organized into small learning communities that infuse career

themes into college preparatory curricula." At the same time, "partnerships with employers, local colleges and community organizations ensure that students have a wide range of work-based learning experiences."

To make learning more meaningful, Porter and associates say the school-academy experience must be fortified by two kinds of credentials: academic foundation certificates and an "industry-recognized skill certificate" leading to "a good entry-level position in a technical field." Many existing tech-prep, career-academy, and career-oriented programs (magnet and otherwise) could be adapted to fit this new high-school credentialing system.

### **Student Achievement**

Several studies examining student outcomes in magnet schools are encouraging. Adam Gamoran's study (1996) of 24,000 students (see below), based on a subset of 48 magnet and 213 conventional high schools in the 1988 National Educational Longitudinal Survey, found that magnet-school students "significantly outperformed their peers attending non-magnets in social studies, science, and reading," despite schools' organizational similarities.

Two studies summarized in the Policy Analysis for California Education (PACE) report (Fuller 1999) posted similar results. In St. Louis, students in magnets outperformed neighborhood-school students in math, reading, science, and social studies. In a San Antonio study of students in multilingual magnets, students denied admission due to space limits, and students in neighborhood schools, magnet students scored significantly higher on math and reading assessment than did the other groups of students.

A spring 1998 study of magnets at Duval County (Florida) Public Schools (Poppell and Hague 2001) found that fewer than half of the district's 78 magnet programs satisfied minimal desegregation goals or could boast above-average parent/community involvement. However, magnet-school students' academic achievement exceeded that of nonmagnet school students at all levels.

### **Less Favorable Findings**

Some other studies have documented negative or mixed results for magnet schools. For example, Steel and Eaton's 1996 evaluation of the Magnet Schools Assistance Program between 1989 and 1991 discovered that only half the schools met their desegregation objectives during the grant period.

A study examining the value-added effects of magnet programs in Prince George's County, Maryland, schools (Adcock and Phillips 2000) showed that "overall, elementary students in magnet programs perform better than nonmagnet students," largely due to self-selection of more able students for magnet programs. However, when student ability is considered in the evaluation design, magnet students perform at lower levels than do their nonmagnet counterparts. Also, talented and gifted (TAG) students in magnet programs performed worse than TAG students in regular schools.



An ACORN (Association of Community Organizations for Reform Now) investigation (1997) of eighty-six middle schools in fourteen New York City districts attributed racial imbalances at two premier academic high schools to "programmatic and geographical tracking" that condemns certain students to failing, zoned high schools. Evidence shows that only a few middle-school students have the opportunity to master the material needed to perform well on entrance examinations, and that race is a major factor.

A study that analyzed changes in enrollment patterns and access to Chicago magnet schools (Allensworth and Rosenkranz 2000) found similar geographical tracking/residential zoning effects. Researchers concluded that "students in the wealthiest sections of the city have access to many more magnet schools than other families" and that access is least available to students living in Latino and low-income African-American neighborhoods on Chicago's South Side. Black students, on average, must travel further "than other students to attend the highest achieving schools in the city." Additionally, many of the 32 elementary magnet schools examined do not meet Chicago Public Schools' desegregation consent-decree goals.

Another study uncovered substantial social and racial isolation in four elementary and middle-level magnet schools in a large urban district in the Southeast (Yon and others 1998). Parents of low socioeconomic status could not participate as often as middle-class parents, due to commuting problems and inflexible work schedules. Student isolation patterns were typical of those found in traditional schools, though efforts to mix kids of different racial backgrounds in classrooms were fairly successful. Some teachers and parents regarded magnet schools as either elitist or intentionally rigorous; few mentioned racial integration as magnets' overarching purpose.

Although Claire Smrekar and Ellen Goldring (1999) found favorable racial desegregation results in Cincinnati and St. Louis magnet schools, they say both systems reflect a "creaming" of more socioeconomically advantaged parents and their children from neighborhood to magnet schools. For these researchers, differences in family income, education levels, and employment status are troubling and should spur efforts to expand low-income parents' participation in the school-choice environment. Also, successful desegregation policies have inadvertently furthered the erosion of community bonding--the social ties and institutions binding families around neighborhood schools.

Smrekar and Goldring's (1999) findings support Hausman's observations: magnets' differences from nonmagnets have less to do with the "unique" curricula promoted in district brochures than with provision of adequate resources and a safe, orderly learning climate. An earlier study by Adam Gamoran (1996), which analyzed National Educational Longitudinal Survey data from 24,000 students, found no significant differences in academic climate between magnet and regular schools.

Finally, Kimberly West (1994), a legal critic, calls magnet schools a "desegregation tool that backfired." According to West, "many magnet schools are rife with racially segregated classes," even when the schools themselves are racially balanced. Minority students are too often herded into remedial and low tracks and "treated as inferior by the

very system that was designed to help them." According to West, white magnet students reap most of the schools' benefits and resources.

### **A Call for Research Balance**

Inspired by Rolf K. Blank's work on evaluating magnet schools, Cordelia Douzenis (1994) urges that researchers look beyond students' achievement scores. An "ideal" evaluation of magnet schools would include achievement and other outcomes of magnet and nonmagnet students; an examination of how a magnet school's leadership, staffing, policies, and curriculum influence outcomes; and an indepth study of factors such as policies and access that affect the entire district.

Studies of magnet schools' performance vary as to consideration of contributing factors such as "family structure or parental income which likely influence the decision to choose magnet schools" (Fuller and others 1999). Government and other school-choice evaluative studies must be careful to address this social-selection effect.

### **Controlled-Choice Options**

Universal controlled-choice plans allow a family to choose among schools within the student's district. A major constraint is that each school must maintain the system's desired racial-balance goals. Controlled-choice fosters two interrelated purposes--voluntary desegregation and improvement of school quality.

Controlled-choice plans differ from other choice plans (such as open-enrollment and voucher models) by not relying on market competition among schools to generate school improvement. Controlled choice can also be implemented as an intradistrict plan, in which several zones or subdistricts are created that can include magnet programs.

Most controlled-choice schemes are modeled after a plan first implemented in Cambridge, Massachusetts, in 1981. Families select and rank four schools in their district in order of preference. The district tries to assign students to their requested schools, but also tries to regulate individual schools' capacities and their racial/ethnic composition. During the past decade, controlled choice has been adopted by many other cities in Massachusetts, New York, and across the nation.

### **Progress in New York City**

A controlled-choice program has been functioning since the 1970s in East Harlem's District 4. Although longitudinal studies are lacking and controversy abounds over test-score measures (Henig 1994), student performance seems to have improved since the mid-1970s, and parent involvement is more pronounced than in districts with less well-developed choice plans (Lamdin and Mintrom 1997).

Mark Schneider and Paul Teske, authors of an unpublished study on District 4, say that students' reading and math scores began climbing after 1974, when the choice program

was introduced (Walsh, March 4, 1998). Although reading scores declined in the late 1980s and math scores leveled off, "District 4 students today are scoring at a level 80 percent higher than citywide averages and almost twice as high as in 1974, when district scores were among the lowest in New York City" (Walsh). Even after controlling for extra funding, "imported" students, smaller schools, or strong administrative leadership, parental choice explains most achievement gains. Moreover, choice has not negatively affected the performance of students remaining in neighborhood schools.

A 1997 study of Community School District 3, in New York City's Manhattan borough, suggests that controlled choice is benefiting many middle-school youngsters, including less fortunate kids (Raywid and Kottkamp). Fifth-graders have twenty-six options; eleven of these are for special-needs students, and five schools mainstream handicapped students. Racial/ethnic groups are well represented in District 3 middle schools. Most students get their first or second choice of schools (despite a 10 percent equity adjustment rate) and are choosing to attend schools other than the nearest one. Choice has made access more equitable than traditional neighborhood-assignment arrangements.

### **Parental-Choice Patterns, Equity, and Competition**

Amy Stuart Wells' (1996) qualitative study of innercity black youth in St. Louis, which examines the cultural and institutional forces shaping students' responses to choice, draws less sanguine conclusions about equity. Wells interviewed three groups of African-American high school students and their parents (nonchoosers, transferees, and returnees) who could choose to participate in a city-to-county transfer plan. Returning students left because of disciplinary, adjustment, or academic reasons. The study showed that feelings of familiarity, ethnic solidarity, and school proximity can be more important than "objective" school-quality measures, parental aspirations, or an "achievement ideology." Wells concludes that choice systems can create both winners and losers; losers are the students lacking safety nets or personal advocates.

A study of parental-choice patterns in Detroit reached similar conclusions (Lee and others 1996). Although support for choice is very strong among low-income and minority families, nearly one-third of parents surveyed had no opinion about choice and had considerably less income and education than those exercising choice options. This means that not all families exercise choice. Also, "the departure of relatively more advantaged children from their home schools and districts can have an adverse effect on schools and families left behind" (Lee and others).

These conclusions are supported by two parent surveys in Fort Collins, Colorado, and Cambridge, Massachusetts. In Fort Collins, parents who enrolled their children in alternative schools were found to be sophisticated consumers already actively involved in their children's education (Bomotti 1996). Unfortunately, only some families exercise a choice; factors that keep some parents from choosing the alternative schools include lack of transportation and inadequate publicity about the program. In Cambridge, parents' choosing patterns and preferences "challenge the premise that parents want choice... and will use Parent Information Centers to gather hard information about school

performance" (Petronio 1996). Parents' decisions also raise questions concerning the equity and quality of alternative programs.

A study of school-choice effects in Boulder Valley (Colorado) School District (BVSD) by University of Colorado researchers (Howe and others 2001) uncovered a strong pattern of inequities in a system that has offered choice options for decades. Currently, "an unusually high percentage" (20 percent) of BVSD students take advantage of open enrollment. Participating parents seemed satisfied with their varied open-enrollment options (including charter schools and magnet-like "focus," "neighborhood focus," and "strand" schools) and overwhelmingly preferred choice over neighborhood schools.

However, the data revealed "skimming" of high-scoring students at the middle- and high-school levels; significant stratification by race and income in BVSD schools since the midnineties; and stratification by special needs at the three "new mission" schools, considered elitist by some. Boulder Valley parents' motivations for choosing schools were mixed; many felt they had to participate so their kids wouldn't lose out.

Open-enrollment procedures and practices "help explain why choice has a stratifying effect." Test scores are widely publicized, and parents are required to seek their own open-enrollment information, visit schools they are considering, and provide their own transportation. The system favors parents with "savvy, time, and resources," including access to informal information networks.

Other practices that contribute to stratification include legacies (preferential admissions for siblings or certain groups); ability to pay (preferences for kids previously attending tuition-based preschools); screening (additional applications and forms); and sweat equity contracts (written parent participation agreements).

According to Howe and associates, stratification is not just an unfortunate side effect of school-choice systems, but practically a guaranteed result. Although further study is needed to ascertain how interschool competition affected "regular" BVSD schools, the evidence points to Boulder Valley's choice system as a "zero-sum game with respect to achievement—a situation in which some schools do better only at the expense of others that do worse."

The same conclusion was reached by a pair of researchers (Fiske and Ladd 2000) who studied New Zealand's newly decentralized school system for five years. This system was built on the premises and promises of parental choice, interschool competition, and charter-school philosophy. Just as in Boulder Valley, Colorado, the schools with the largest drop in white enrollments had larger drops in overall enrollment. Conversely, the schools with relatively high minority enrollment saw increased "percentages of minority students when a choice system was implemented." The good schools got better, and the bad schools got worse. As one expert (Picus 2001) points out, "approximately 25 percent of the schools required help from the central government to meet their students' needs." The schools were not closed; "private market alternatives did not appear despite the

existence of enhanced competition, and the schools were needed to accommodate students."

More research clearly is needed to evaluate effects of current market-based alternatives on achievement and school demographics.

### **Phaseouts for Busing Programs**

For several decades some districts, often under court order, have operated controlled-choice plans with the hope of achieving desegregation through student transfers. In recent years several of these districts have sought phaseouts of their programs for varied reasons.

Urban school districts in Seattle, Cleveland, Pittsburgh, and elsewhere are attempting to scale back or eliminate race-based busing, following U.S. Supreme Court decisions in the early 1990s enabling districts under desegregation orders to reinstate neighborhood schools (Hendrie, December 3, 1997). In fact, some experts consider the days of busing and court oversight to be numbered; others anticipate an end to "traditional" integration efforts and a resurgence of the "separate-but-equal" concept (Kunen 1996).

Under a rezoning plan ratified in November 2000, Prince George's County (Maryland) Schools planned to move 41,000 ninth- and tenth-graders back to neighborhood schools (Johnston 2001c), largely due to changing school and neighborhood demographics. The district has gone from 85 percent white in 1972 to 75 percent black in 2000, so it seemed counterproductive to bus black students to predominantly black schools.

In March 2001, a federal court overturned one of Florida's longest standing desegregation orders—"the latest in a string of decisions to reverse decades of court oversight in Florida districts once found to operate racially divided schools" (Johnston, March 28, 2001). The Hillsborough County system (including Tampa) "was declared free of segregation and released from a 1971 desegregation order." The appeals court, reversing a U.S. District Court's 1998 ruling, observed that "growing concentrations of black and Hispanic students in several Hillsborough schools were due to demographic shifts, and not the result of district practices." In early October 2001, the U.S. Supreme Court declined to overturn the appellate court's "ruling that the district was no longer segregated" (Walsh, October 3, 2001).

In September 2001, a federal appeals court ruled that "more than three decades of court-ordered desegregation in the Charlotte-Mecklenburg, N.C., schools should end" (Reid, October 3, 2001). The school board voted unanimously not to appeal this decision, and intends to move ahead with a school-choice plan "that does not use race as a factor." Roslyn Mickelson, professor of sociology at the University of North Carolina, insists that ability grouping and tracking are resegregating Charlotte's students and wants political, educational, and social pressures to compel the district to address this problem in its 141 schools.

Charlotte-Mecklenburg's 2002-03 choice plan will divide the district into four geographic choice zones, allowing students to attend any school in their assigned zone, with transportation provided. The plan includes nonracially based "student assignment priorities" to ensure that schools don't have high concentrations of low-income or low-performing students (Reid, October 3, 2001).

Court-mandated desegregation plans are still operational in Connecticut. In January 2001, Connecticut Commissioner of Education Theodore Sergi "pressed for a substantial increase in funding" for programs the state is implementing to reduce racial isolation in its schools (Archer 2001). This action came a week after plaintiffs in a long-standing segregation case "announced they were reviving their lawsuit," contending that "the state has not adequately responded to the Connecticut Supreme Court's mandate." Plaintiffs and state officials both agree that lawmakers have not provided enough money to implement choice programs aimed at changing the racial/ethnic composition of schools in Hartford or nearby districts.

According to Sergi, progress is being made; "the number of students served by Connecticut's interdistrict magnet schools [grew] from 1,500 to 6,100 since 1997"; the number served by Open Choice, the state's interdistrict transfer program, rose from 470 to 1,480. Funding for both programs would need to be increased by several million dollars to further these efforts (Archer 2001).

In a paper reviewing desegregation cases, public attitudes, and urban school-choice systems, Loretta Meeks and her associates (2000) state that the "apparent end of court-ordered desegregation" has facilitated the emergence of choice options as alternatives to forced busing and improved access to better schools for less affluent families.

They agree with other critics and researchers (Smrekar and Goldring 1999, Howe and others 2000, Fuller 2001, Fiske and Ladd 2000) who claim that choice has also allowed white parents to avoid enrolling their kids in predominantly minority schools. The authors find little evidence that choice has banished segregated classrooms or addressed internal problems of existing public schools by allowing dissatisfied parents to abandon them. The problem, according to the authors, is that the funding of alternatives depletes resources from the primary system; in sum, it is impossible to "make one system equitable without making another more inequitable."

### **Socioeconomic Integration Plans**

As communities across the nation abandon racial desegregation efforts, a new approach to the resegregation dilemma is emerging. *Socioeconomic integration* is an administrative scheme to mix students according to parental income, not racial background (Kahlenberg 2000). This approach, achieved by reconfiguring existing urban controlled-choice plans, "promises to give all students access to schools that have a core of middle-class families"—a reliable predictor of school quality, according to many educators and researchers.

Socioeconomic integration plans are garnering bipartisan support in many communities, including San Francisco, California; Cambridge, Massachusetts; Louisville, Kentucky; St. Petersburg, Florida; and Montgomery County, Maryland. In several communities, "teachers are leading the fight for socioeconomic integration," and incentives to encourage middle-class families' participation are being considered (Kahlenberg 2000). In fall 2000, North Carolina's Wake County District "will limit the percentage of needy and low-performing students in each of its 110 schools through a controversial student-assignment plan" by busing about 3,500 students to new schools or schools outside their neighborhoods (Johnston 2000).

## Charter Schools

Charter schools have become an increasingly popular brand of intradistrict or public-sector choice. The Center for Education Reform's 2001-02 National Charter School Directory profiles 2,431 schools in 34 states and Washington, D.C. These schools serve nearly 580,000 children and involve more than 1.6 million people, including students, parents, teachers, administrators, and charter-school board members ("Charter School Highlights and Statistics" 2002).

According to CER's directory, 374 new charter schools opened their doors in September 2001, and 77 more were approved to open in fall 2001.

During 2000, according to a U.S. Department of Education report, about 1,700 charter schools were serving at least 250,000 students in 36 states, the District of Columbia, and Puerto Rico during 2000 (Bowman 2000). A comparison of this figure (1,700) with the number of charter schools in CER's latest directory (2,431) shows that charter schools have grown by more than 40 percent during the past two years.

In May 2001, Indiana became the thirty-seventh state to enact charter-school legislation. Indiana, New Hampshire, and Wyoming have charter statutes, but no operating charter schools as yet (Center for Education Reform website).

Charter schools reflect their founders' varied philosophies, programs, and organizational structures, serve diverse student populations, and are generally committed to improving education (Hadderman 1998). In fact, a major premise of the charter movement is that public schools should become knowledge-driven instead of entitlement-driven. State charter laws are aimed at "raising all boats," not creating a few good alternative schools (Watkins 1999).

The U.S. Department of Education's financial support for charter schools "has grown from \$6 million in 1995 to \$100 million in the 1999 fiscal year" (Watkins 1999). The requested appropriation for fiscal 2000 was \$130 million (Medler 1999), but \$145 million was granted (Olson 2000).

Freed of many restrictions placed on traditional schools, charter schools are reimbursed by the state for each student (equaling the average statewide per-pupil expenditure). In

return, these schools are expected to achieve certain educational outcomes within a certain period (usually three to five years), or have their charters revoked by sponsors (a local school board, state education agency, or university).

Proponents claim charter schools are a mixed supply-and-demand reform that will expand choice, improve accountability, and free teachers from regulation. Opponents fear the potential loss of students and state allowances. They also claim charters are a gateway to educational vouchers. Others see charter schools, with their emphasis on autonomy and accountability, as a workable political compromise and an alternative to vouchers. The charter approach blends market principles with democratic and nonsectarian values.

## **Origins, Founders, Students, and Advocates**

Charter schools usually originate from "conversions" of preexisting public (and a few private) schools or are "startups" born with their charters (Manno and others 1998). Pointing to data from a 1997 U.S. Department of Education survey, Manno and his colleagues write, "56.4 percent of charter schools operating in 1995-96 were start-ups, 32 percent were once regular schools, and 11.1 percent were once private schools."

Manno and associates (1998) identify three interrelated groups of charter-school founders: reform-minded educators, visionary parents dissatisfied with public schools, and for-profit or nonprofit organizations. In the midnineties, founders' motives for creating charter schools included realizing an educational vision (61.1 percent), possessing autonomy (24 percent), and serving a special student population (12.7 percent) (U.S. Department of Education 1997).

By 1999, founders' primary motivations appeared to have shifted slightly, according to a U.S. Department of Education survey of 946 charter schools. About 58 percent wished to realize an alternative educational vision, while 23 percent wanted to serve a special population of (at-risk) students, and only 9 percent wanted to gain autonomy (Bowman, February 16, 2000).

According to Jeanne Allen, president of the Washington-based Center for Education Reform (1999), "the vast majority of people who started charter schools saw something lacking in the traditional school system" and wanted to help the kids most underserved by that system (Bowman, February 16, 2000). The center's own survey found that some schools "sought charter status to gain more autonomy or to improve their financial situation." Converted public schools cited the former goal; converted private schools, the latter.

Although African-American immersion charter schools are common in some urban areas, other major ethnic/minority groups have been slower to take advantage of the charter movement. This situation is changing; a Washington-based national advocacy group, the National Council of La Raza, has been raising \$10 million from private foundations to launch a charter-school initiative aimed at Latinos (Zehr, November 21, 2001). Six local affiliates have already opened schools assisted by these grants, and another eleven



affiliates have schools in the planning stage. Leaders say "creation of the schools is motivated as much by a desire for high standards as the expectation of studying and celebrating Hispanic culture." The NCLR initiative is favored over voucher proposals, since it "requires grant recipients to provide special education and English-language acquisition."

According to Zehr, the NCLR, well known for its afterschool programs, affordable housing, and day-care services for Hispanics, is only one of several community-based organizations that target underserved populations. Others considering provision of technical aid and grants to charter schools include the national YMCA, Youth Build USA, and Volunteers of America, Inc. Local YMCAs in Detroit, Houston, and Akron are already operating charter schools, and Chicago's is studying a La Raza-like initiative.

### **State Leaders and Statutes**

In 1991, Minnesota adopted charter-school legislation to expand a longstanding program of public-school choice and to stimulate broader system improvements. Since then, the charter-school movement has spread to nearly three-quarters of the states.

State laws follow varied sets of principles based on Ted Kolderie's recommendations for Minnesota, American Federation of Teachers guidelines, and/or federal legislation. Principles govern sponsorship, number of schools, regulatory waivers, degree of fiscal/legal autonomy, and performance expectations.

Current laws have been characterized as either strong or weak. Strong-law states mandate considerable autonomy from labor-management agreements, allow multiple charter-granting agencies, and allocate realistic per-pupil funding levels. Arizona's 1994 law is the strongest, featuring multiple charter-granting agencies, freedom from local labor contracts, fifteen-year charter periods, and large numbers of permitted charters (Rebarber 1997).

More than 70 percent of charter schools are found in states with the strongest laws: Arizona, California, Colorado, Massachusetts, Minnesota, and North Carolina. Other states with strong- to medium-strength laws include Delaware, District of Columbia, Florida (the only state with a countywide charter-school district), Indiana, New Jersey, New York, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, Texas, and Wisconsin (Center for Education Reform website).

The Center for Education Reform describes the following states as having weaker laws: Alaska, Arkansas, Connecticut, Georgia, Hawaii, Illinois, Kansas, Louisiana, Mississippi, Nevada, New Hampshire, New Mexico, Rhode Island, Utah, Virginia, and Wyoming.

According to two legal experts, states with unusually permissive legislation may be creating charter schools that are not considered public enough to receive state funding (Green and McCall 1998). Based on a recent Michigan lower court's decision, thirteen states may be vulnerable because they lack methods for choosing or removing their

charter-school boards of directors. Six states (Alaska, California, Hawaii, North Carolina, Rhode Island, and Wyoming) fail the Michigan court's test, since they allow no state influence over curricula beyond revoking charters. Four states (California, Delaware, Hawaii, and Wyoming) are vulnerable for authorizing no state control over charter schools' daily operations.

An innovation-diffusion study surveying education policy experts in fifty states found that charter legislation is more readily considered in states with a policy entrepreneur, poor test scores, Republican legislative control, and proximity to other strong-law states (Mintrom and Vergari 1997). Legislative enthusiasm, gubernatorial support, interactions with national authorities, and use of permissive charter-law models increase the chances for adopting stronger laws. Seeking union support and using restrictive models presage adoption of weaker laws.

### **Charter Schools' Progress: An Overview**

**U.S. Department of Education Reports.** The U.S. Department of Education's "Fourth-Year Report" (2000) corroborated the findings of its previous reports on charters' racial diversity and small size. Charters are somewhat more racially diverse, serve a slightly higher percentage of economically disadvantaged students, and serve a slightly lower proportion of disabled and limited-English-proficiency students than do other public schools. Most charter-school classrooms had computers for instruction and low student-to-computer ratios. Charters serving younger students tended to have smaller classes than other public schools. High-school charters had classes the same size or larger than in other public schools.

Another Department of Education report reviewed states' charter-school legislation to determine the extent to which the charter laws deal with disabilities-related issues. Researchers concluded that "none of the states include provisions related to goals, accountability, or assessment for students with disabilities" (Fiore and Cashman 1998). Few states specify who is directly responsible for developing education programs for these students. However, some state laws do contain provisions that prohibit discrimination, promote enrollment of special populations, and provide for special-education funding and transportation.

**Additional Progress Reports.** "Charter schools are havens for children who had bad educational experiences elsewhere," according to a Hudson Institute survey of students, teachers, and parents from fifty charters in ten states. Over 60 percent of parents said charter schools were better in terms of teaching quality, individual attention from teachers, curriculum, discipline, parent involvement, and academic standards. Most teachers said they felt empowered and professionally fulfilled (Vanourek and others 1997).

Joe Nathan (1998) points to other signs of progress. The number of active charter schools grew from one in 1992 to over 800 in early 1998 and 1,400 by September 1999 (U.S. Department of Education 2000). Charter schools have also attracted veteran community

activists (such as Rosa Parks) and received bipartisan support from state legislatures (for example, in Colorado) and Congress (in 1999). Federal contributions have grown from \$6 million in fiscal-year 1995 to \$145 million for FY 2000.

Similarly, the Center for Education Reform (1999), an advocacy group that gathered over 50 reports on charters' progress across a number of indicators, says 80 percent of the charter schools studied are achieving their stated goals. The center's own report describes a sampling of dramatic, objective, and verifiable achievement gains demonstrated by individual charter schools in fourteen states.

A recent research update (CER website) increases this figure to 93 percent, as 61 out of 65 studies claim positive effects for charters. The Center's *Survey of Charter Schools, 2000-2001* reports that 97 percent of responding charters administer at least one standardized test annually; most teach underserved youngsters, including at-risk, minority, and low-income students; nearly one-quarter use either "Core Knowledge" or direct-instruction techniques in their schools; and almost two-thirds of charters have long waiting lists.

In their book analyzing charter-school literature, Thomas Good and Jennifer S. Braden (2000) acknowledge charter schools' political success while concluding that charters have not lived up to their legislative mandates—to innovate instruction and enhance student achievement.

Instead, "charter schools, as a group, have led to the transfer of a significant percentage of states' funds from instructional to administrative costs." Data also show that charters have "further segregated students on the basis of income level, ethnicity, and special needs." Good and Braden advocate tightening laws so that charters can become instructive, positive examples for other schools, rather than a wasteful laboratory experiment.

About twenty-five charter schools (in California, Colorado, and Minnesota) have had their contracts renewed because they produced measurable achievement gains for students of both lower and higher income families (Nathan 1998). Nathan (1999) also enumerates impressive achievement gains by charter-school students in many communities, including Lawrence and Springfield, Massachusetts; Marietta, Georgia; Los Angeles; and Pueblo, Colorado.

### **Charters as Reform Catalysts**

The charter idea (even the threat of chartering) has stimulated improvements in the broader education system. For example, Minnesota districts that had refused to create Montessori schools did so after frustrated parents began discussing charters (Nathan 1996). The flagship Duke Ellington School in Washington, D.C., withdrew plans to secure charter status only after the district promised it greater authority over hiring and firing decisions (White 1999).

To lure charter students back to district schools, Flagstaff (Arizona) Public Schools recently "opened a new magnet school focused on academics, technology and character development" and began funding an all-day kindergarten (Pardini 1999). Competition from charter schools also inspired the Williamsburg (Massachusetts) School District to begin an afterschool program (Rofes 1999).

According to the Center for Education Reform (2000), seven out of eight national and state studies that evaluated charters' effects on their home districts demonstrate "a positive ripple effect" manifested in low-cost reforms (like informational campaigns and teacher retraining), high-cost reforms (like full-day kindergarten), increased accountability, improved academic programs, and adoption of innovative, "charter-like" practices.

**The Effects of Competition.** When doctoral student Eric Rofes (1998) interviewed teachers, district administrators, and charter-school leaders and founders in twenty-five districts in eight states, he found that six districts "had responded energetically to the advent of charters and had significantly altered their educational programs." For example, the highly responsive Adams County (Colorado) School District "had chartered numerous schools as part of its broader reform strategy, responded to parent requests for more back-to-basics programs, and created stronger thematic programs in its traditional schools."

The Mesa (Arizona) School District, a high-performance district that was nonetheless losing students to charters, had a more moderate response: adding back-to-basics district schools and aggressively promoting its existing programs. Grand Rapids (Michigan) School District, another "moderate" responder, stepped up its public-relations campaign and opened a school focused on environmental studies.

However, the majority (particularly large urban districts such as San Diego, Milwaukee, and Washington, D.C.) went "about business-as-usual," intensifying public-relations efforts to counter media focus on charters (Rofes 1999, 1998). Few district educators viewed charters as "educational laboratories" or sources of innovative strategies. Rofes says these findings are not particularly discouraging, given school-reform history. Competition is spurring a few superintendents "toward greater improvement in the district schools."

Rofes found that degree of financial impact was not the only contributing factor to district responsiveness to charters. Other critical elements included the overall school-choice ecology in the district, student performance, existence of a critical mass of charters in the area, community awareness, and district leadership.

According to another expert, the "competition mechanism" may not always work as charter-school proponents expect (Hassel 1999). Evidence from case studies of four states (Colorado, Georgia, Massachusetts, and Michigan) suggests that districts have a wide range of response modes besides improving their programs.

Districts can use the courts and subsequent legislation to derail or restrict charter schools; employ hostile bureaucratic tactics to delay implementation; respond to fiscal duress by cutting back on popular programs (like art and advanced placement); or peacefully coexist with charter schools. Charters often serve as safety valves to alleviate overcrowding and mitigate disgruntled parents' complaints. According to Hassel, charter schools may gradually wear down the system, but they will never replace it.

Andrea DeLorenzo, codirector of the National Education Association's Charter Schools Initiative, acknowledges that charters' presence has spurred some districts to add programs, but says the "jury is still out in terms of larger systemic change" (Lockwood 1997). For DeLorenzo and her NEA colleagues, the competitive model thwarts the initiative's objectives: "to keep public schools strong, viable, and responsive to the needs of children" via cooperation among public schools of all kinds.

A U.S. Department of Education study (website 2000) examined 49 districts in 5 states (Arizona, California, Colorado, Massachusetts, and Michigan). Nearly every district "reported impacts from charter schools and made changes in district operations, in the district educational system, or in both areas." Nearly half the districts "perceived that charter schools had negatively affected their budget"; nearly half became more service-oriented and increased marketing or public-relations efforts or stepped up the frequency of communication with parents. Most implemented new academic programs, restructured district organization, or developed new schools with programs resembling those in local charter schools. Districts that did not grant charters (particularly those with declining enrollments) were more likely to experience minimal budgetary effects from charter-school competition.

Opinions differ concerning Inkster (Michigan) Public Schools' alleged victimization by competition from six charter schools established during the mid-1990s "that have entic[ed] more than 500 students out of the district's schools" (Ladner and Brouillette 2000). Between 1960 and 1999, the district's enrollment fell from 5,000 students to about 1,750. One charter school stressing parent cooperation is responsible for drawing 221 students from district schools.

National and local media played up charters' responsibility for the district's predicament. However, empirical data from Ladner and Brouillette's case study of limited choice's effects show that Inkster "was well down the road to closure" before competition from any formalized choice program was introduced in 1995. In fact, enrollment decline actually slowed between 1995 and 1998. Deleterious factors included low test scores, school board instability, high leadership turnover, and racial tensions. According to the authors, expanded choice in the form of charter schools rescued the children of less-wealthy parents (composing 70 percent of the community) who could not afford to move out of the district or pay private-school tuition.

To avoid a state takeover, Inkster is turning over management of its schools to Edison Inc. in a five-year contract starting in fall 2001 (Bowman, February 23, 2000).

According to Gerald Bracey (2001), competition among *private* schools can be an unintended consequence in some states that allow private schools to convert to charter schools. Laws permitting private schools to convert also forbid them from charging tuition beyond the public funds received. They are essentially offering for free the same education program as formerly, unlike regular private schools that can charge what the market will bear.

## Statewide Evaluations of Charter-School Progress

Since charter-school legislation in most states is less than a decade old, state-sponsored studies tend to be preliminary evaluations that avoid overarching conclusions regarding students' academic progress or charters' effects on the greater education system. Five states whose charter systems have been extensively studied by state agencies and university researchers are Colorado, Arizona, Massachusetts, Michigan, and California.

**Colorado.** Acknowledging that its study of Colorado's first 32 charter schools will sway neither skeptics nor proponents, the Colorado Department of Education (1999) seeks common ground for examining what works, what needs fixing, and what charter experiences might benefit other public schools.

According to this report, *1998 Colorado Charter Schools Evaluation Study* (published in January 1999), Colorado charter schools (operating for at least two years) have high levels of parent participation; favorable market indicators (waiting lists, retention rates, and parent satisfaction); high teacher satisfaction; and increased capacity for measuring school performance. Most schools are meeting or exceeding their stated goals; performance on the Colorado Student Assessment Program is stronger than state averages.

On the minus side, the student population of Colorado charter schools is not as diverse as that of the state as a whole. This admission is corroborated by a *Denver Post* article, which stated that "two-thirds of the African American, Hispanic, and low-income students enrolled in charters in Colorado were in four of the state's 32 charter schools" (Lockwood 1997). Several schools have experienced a very high turnover of building administrators and board members. Also, innovative approaches are rare, and few charter-school approaches have been transferred to other public-school settings.

**Arizona.** In a study commissioned by the Arizona Department of Education, The Morrison Institute for Public Policy examined the progress of 82 (out of 137) representative Arizona charter schools. Findings showed that students' key reasons for transferring to charter schools were poor academic performance and/or dissatisfaction with their former schools. Parents and students seem more satisfied with charter schools and their teachers than with the public schools they formerly attended. Student performance on the Stanford 9 Achievement Test mirrors that of students attending regular public schools.

Parents, students, and staff are concerned about funding, lack of sports and other extracurricular activities, credit transferability, and inadequately implemented special-education requirements. Other stakeholders' chief worries include accountability for student achievement, special-education implementation, and teacher/director qualifications.

An Arizona State University study that compared the ethnic composition of adjacent charter and regular public schools in the state's most populous and rural areas discovered considerable ethnic segregation (Cobb and Glass 1999). Arizona charter schools were "typically 20 percentage points higher in White enrollment than the other publics"; those with substantial minority enrollments tended to be vocational schools or last-chance arrangements for kids expelled from regular schools.

In Bryan Hassel's (1999) analysis of charter-school laws, Arizona's policy environment scores high on two organizational-innovation dimensions (autonomy and choice/competition) and low on a third dimension—accountability. Arizona charters are independent entities that are directly funded by the state, have more potential authorizers than in other states, and enjoy fifteen-year chartering periods. Choice is furthered by lack of school-board veto power over charter applications, limited restrictions on numbers, and full per-pupil funding for operating (but not startup) costs.

Accountability, however, is hampered by lack of a central oversight authority and of rigorous, clear standards (see also Accountability section below and Contract Schools section). Appalled by abuses such as financial fraud, nepotism, and religious intrusions in Arizona's charter "experiment," Arizona State Senator Mary Hartley (1999) has three recommendations: restrict the number of new charter schools, increase reporting requirements and state monitors, and increase parental opportunities and responsibilities for school governance.

Stout and Garn's (1999) study of fifty Arizona charter schools shows that "the rhetoric of curricular innovation is more interesting than the reality." This observation holds true for at-risk, college-preparatory, and special-focus schools. There is little evidence to show that charter-school activity is enhancing student achievement. Standard Nine test scores for charter-school students resemble those of regular public-school students.

A primarily descriptive case study of forty of Arizona's fifty fifth-year charter schools (Gifford and others 2000) sponsored by the Goldwater Institute revealed some interesting student demographics. According to this report, "about half the schools target and enroll at-risk students," 30 percent target traditional students, and "slightly less than 10 percent target college preparatory students." Although 70 percent of respondents say they are serving their target populations, some 10 percent believe "they have missed their target population."

Some of these Arizona charter schools draw students from several residential areas and districts. The charters in this sample were 10 percent whiter than district schools, but

served "a slightly larger percentage of black students and considerably fewer Hispanic students than districts" (Gifford and others 2000).

The charters reported using a team approach (including teachers and parents) in developing new curriculum and purchasing materials. Students follow coursework based on the Arizona Academic Standards and take the Arizona's Instrument to Measure Standards test in grades 3, 5, 8, and 10 through 12. No test results are given. Over half the schools report student entry at less than grade level, but say kids "get closer to grade level the longer they are at the charter school." At the high school level, entering students' average grade level was sixth grade. Nonacademic goals such as improved socialization, workplace readiness, and community service were common, and parents gave their children's schools A and B ratings.

**Massachusetts.** A state department of education report on the first three years of Massachusetts's charter-school initiative highlights four central features of charter schools: academic/administrative freedom, accountability, innovation, and choice.

Although the Massachusetts Comprehensive Assessment System is too new to evaluate current charter students' progress, other data suggest that students entering charter schools had achievement records that were at or below district averages. Since 1995, several schools have shown achievement gains on alternative standardized tests. Researchers concluded that charter schools have higher aggregate proportions of minority, low-English-proficient, and economically disadvantaged students and lower proportions of special-needs students than state averages.

Massachusetts charter schools' greatest challenges are securing adequate funding for facilities (partly remedied by a state facility-funding allotment of \$270 per student in 1998-99) and satisfying special-education requirements. Despite the Commonwealth report's reassurance concerning most charters' inclusive and supportive practices, some for-profit charter schools (operated by Edison and Sabis) have been criticized for "systematically returning students with complicated disabilities to local district schools" (Zollers and Ramanathan 1998, 1999).

Also, none of the for-profits have bilingual programs for their minority-language students—a violation of state law. Zollers and Ramanathan find this situation particularly distressing, since these charter schools receive funding (including transportation stipends) for both LEP and disabled students whom they are not serving (1998). (See Contract Schools section for a comparison of Massachusetts education management organizations' [EMOs] management and governance with those of other charter-school operators.)

**Michigan.** A Michigan Department of Education study of fifty-one schools (in the western/central regions of the state) participating in the Michigan Public School Academy (PSA) initiative discovered that most PSAs (charter schools) were very small, but steadily increasing in size (Horn and Miron 1999). "Cookie-cutter" or "franchise" schools started by management companies are the fastest growing of four distinct varieties.



Although "some schools celebrate diversity and strive to increase racial and social diversity of students, others have very few, if any, minorities or students with special needs." Over the past few years, there has been a 12 percent decrease in the proportion of minorities served by PSAs. Most PSAs reported "having no students qualifying for the Free Lunch Program" (either from ineligibility or failure to fill out paperwork), say Horn and Miron.

Researchers found little evidence that PSAs' missions included critical, supposedly mandatory elements such as innovative teaching methods, equitable use of funding, greater accountability, or creation of new professional opportunities for teachers. The most innovative feature of charter schools is their governance—by boards of directors appointed by the authorizer.

Findings of another Michigan Department of Education report—this one on charter schools in southeast Michigan—echoed those of Horn and Miron (1999). In this region, charter schools' minority composition closely mirrors that of surrounding public schools. A majority of students do qualify for the Free Lunch Program, though food service in these schools is nonexistent. Administrator inexperience and teacher-retention problems compound startup woes. The most experimental schools are "niche" schools serving special populations, such as African-Americans and hard-to-teach students.

In a recent report, three Michigan State University professors draw rather negative conclusions about charter schools' performance. Their report documents declining minority participation in some regions, a trend toward social sorting, lack of instructional innovation, and inadequate provision of special-education services (Sykes and others 2000). Sykes and colleagues recommend that the involvement of for-profit education management organizations (EMOs) in 70 percent of Michigan's charter schools receive closer scrutiny.

An allied report by Sykes and two MSU colleagues also supports claims that Michigan's school-choice policies (governing both charters and controlled-choice options) contribute to social-sorting practices (Arsen and others 1999). Many charter schools are increasingly targeting "niche markets" by promoting certain ethnic or value orientations. Others are attempting to shape their student populations by requiring parents to complete applications or participate in pre-enrollment interviews. The report makes policy recommendations to curb abuses and put charters on equal financial footing with other public schools.

In another Michigan State University study, political-science professor Michael Mintrom (2000) interviewed 272 principals from Michigan charter schools and regular public schools concerning their perceptions of innovative or distinctive practices at their schools. Results show more similarities than differences. Mintrom concluded that "Michigan's charter schools are no more remarkable than other public schools when it comes to administration, curriculum, and many other elements of education."

**California.** An SRI International report prepared for the California Legislative Analyst's Office and a spin-off paper by two SRI researchers summarized study results of charter-school effectiveness in that state. The two documents highlight reform practices, distinguishing characteristics, and accountability issues (Powell and others 1997; Anderson and Marsh 1998). Data were gathered via phone surveys (from 111 out of 127 charter schools approved by April 1997), mail surveys, and onsite, structured interviews.

In California, conversion and startup schools varied widely as to staffing, financial autonomy, size, and services to special-need students (Powell and others 1997). Charter schools differed from noncharters by being smaller; enrolling students outside their sponsoring district boundaries; serving all grade levels, but in nontraditional groupings; and enjoying high parent-participation levels.

Anderson and Marsh identify several distinctive charter-school practices: home-based and independent-study programs, use of parents and noncredentialed teachers for some courses, mandatory parental involvement contracts, and financial independence for some charters. Because of liability and other concerns, only 11 percent of charters achieved true fiscal autonomy; many did not seek independence from their sponsoring agencies.

The report by Powell and colleagues (1997) found that California charters were similar to the state average in serving low-income, special-education, and minority-language students. Starting teacher salaries, teacher ethnicity, and union representation resembled other public schools' arrangements. Student outcomes were inconclusive, and charter schools were held more accountable fiscally than academically.

In a UCLA study, Amy Stuart Wells (1999) attempted to assess typical charter-school claims (for accountability, autonomy and empowerment, efficiency, choice, competition, and innovation) against actual results in seventeen charter schools in ten California school districts. In most cases, the study's fifteen findings do not support these claims and have unfavorable policy implications.

California charter schools are not yet being held accountable for enhanced student achievement, due to a dismantled statewide testing system, vaguely defined benchmarks in chartering documents, and disagreement over standards, responsibility, and reportage issues. As in the SRI study, Wells found that few charters desired complete autonomy from local districts and that credentialing and union membership were highly valued.

As for the efficiency claim, Wells (1999) "found no schools doing 'more' with less." Some charter schools were funded at "normal" levels, and some struggling, resource-deficient startups were simply poor, not efficient. Also, parental choice benefited some families more than others. Through recruitment and requirement mechanisms, charters themselves became choosers of potential attendees. Parents had more difficulty choosing charters than regular schools. Lack of transportation and stringent discipline policies affected who could enroll.

Additionally, the UCLA study found that the requirement that charter schools reflect their districts' racial/ethnic makeup was not being enforced. In 10 of the 17 schools studied, "at least one racial or ethnic group was over- or under-represented by 15 percent or more in comparison to their district's racial make up."

Finally, the study found little evidence that competition from charters was inspiring reforms in sponsoring districts. Many public-school educators dismissed the idea of competition, saying charters had an "unfair advantage," due to their student-selection criteria. Although Wells did note some innovative practices in classrooms and administrative offices, there were no mechanisms in place for charter schools and regular public schools to learn from each other.

**New Jersey.** On October 1, 2001, the New Jersey Commissioner of Education submitted a favorable evaluation of its charter school program based on public hearings, an independent and comprehensive study, and four years of implementation experience (New Jersey Department of Education website 2001). Since 1997, when the first charter school in the state was opened, enrollment has grown to 11,300 students attending 51 charter schools.

As a whole, New Jersey's charter-school students "are making substantial progress in achieving the Core Curriculum Content Standards in some, but not all areas of statewide assessments" for elementary and middle-school students. Charter schools are outperforming district noncharters in math and reading, but not in other areas. Charter schools enjoy "lower class sizes, lower student-faculty ratios, lower student mobility rates, extended school days and academic years, and higher faculty attendance rates than their districts of residence." Demand, satisfaction, and involvement are high among both parents and students. There seems to have been no substantial positive or negative affects on district programs or budgets.

Commissioner Vito Gagliardi concluded that the charter-school program should be continued and improved in several ways. Policymakers should provide charters with state aid for facilities, allow schools to incur long-term debt with appropriate controls and restrictions, allow public funds to be used for constructing facilities and establishing a charter-school support center, revise and stabilize state-aid funding mechanisms, provide state-funded grants to beginning founders, require newly approved charters to engage in comprehensive planning, and provide additional relief from mandates. The commissioner wants to create more incentives for establishing conversion charter schools and charter schools operated by businesses and higher education institutions.

### **Exemplary and Innovative Charter Programs**

Nathan and other writers enumerate examples of charter-school successes, ranging from achievement gains for innercity youngsters at the New Visions Charter in Minneapolis and St. Paul's City Academy to improved reading scores for very low-income, language-minority students in Los Angeles, and improved vocabulary and math achievement for

high school students at Boston's City on a Hill (Nathan, Rebarber 1997; Geske and others 1997).

A few charter schools have earned reputations as "educational powerhouses" (Toch 1998). Sankofa Shule, a Lansing, Michigan, Afrocentric elementary school, offers instruction in four languages. The Arizona (Phoenix) School for the Arts, which accepts all interested students regardless of talent, combines a performing-arts program with a college-prep core curriculum.

Samples of innovative programs include the Henry Ford Academy of Manufacturing Arts and Sciences, housed in Detroit's renowned Henry Ford Museum and Greenfield Village (Abercrombie 1998), and two worksite charter schools for children of medical workers in downtown Dallas and Houston (Schnaiberg, March 25, 1998).

Two charter-school operations in California, Hickman Charter School in the San Joaquin Valley (Nathan 1996) and Options for Youth (with nineteen locations throughout the state), offer both public-school and home-school options for students. Options for Youth uses no district monies but is financed by the state charter-school funding formula (Perry 1998).

Teacher unions are also getting into the act, with three out of five NEA-sponsored schools operating in Colorado Springs, Colorado; Norwich, Connecticut; and Oahu, Hawaii (Schnaiberg, March 11, 1998a). The union hired Amy Stuart Wells to document, study, and share the five pilot schools' experiences (Schnaiberg, March 11, 1998b).

**Residential charter schools.** Several residential charter schools hope to enroll a few innercity students before they pose disciplinary problems (Weatherford 2000). In 1997, Boston University's state-funded Residential Charter School was founded to help former foster- or group-home youngsters develop academic and social skills. In the District of Columbia, the SEED Public Charter School "provides a residential, coed learning environment for academic underperformers from troubled homes." Piney Woods Academy, a black prep school, will soon replicate its academically rigorous program at a new residential school within the Detroit school system, thanks to a \$400,000 Kellogg Foundation grant.

**Cyber charter schools.** Cyber schools are carving out a charter niche that defies the rules associated with brick-and-mortar conceptions of education (Trotter, October 24, 2001). As of fall 2001, "at least 29 cyber charters were operating in Alaska, Arizona, California, Colorado, Florida, Kansas, Minnesota, New Mexico, Ohio, Pennsylvania, Texas, and Wisconsin" (Center for Education Reform website). Enrollments vary widely, from fewer than 100 students to as many as 3,000. Proponents believe that cyber charters could proliferate, since online schools are unburdened by construction and maintenance costs, use fewer teachers than regular schools, are becoming popular with parents, and can easily obtain commercially packaged curriculum, management, and technical services (Trotter, October 24, 2001).

In Pennsylvania, Texas, and Ohio, however, litigation is raging over turf responsibilities and disputed charges for cyber-school courses. Critics and a few policymakers are questioning whether cyber charter schools are simply "glitzy versions of home schooling" and undeserving of public funding. The National Association of State Boards of Education appears to favor greater flexibility for public schools using e-learning, while promoting tougher regulation of cyber-charters (Center for Education Reform Newswire 2001).

At this point, the Texas legislature will not approve funding for cyber charters taught by parents; the Houston district will pay only for thirty Texas Virtual students enrolled in its catchment area. The Pennsylvania School Boards Association "is supporting a state senate bill that would require charters to get a district's approval before enrolling any of its students" (Hardy, September 2001); PSBA also wants more state involvement in funding and operating cyber charters (see also Home Schooling section).

## Implementation Problems

**Startup Obstacles.** Nearly all charter schools face implementation obstacles, but newly created schools are most vulnerable. Most new charters are plagued by resource limitations, particularly inadequate startup funds. Although "doing more with less" may be a worthy goal, constant fund-raising pressures "can divert educators and parents from paying adequate attention to the educational business of schools" (Medler 1997).

To survive, many struggling startups eventually surrender operations to for-profit education-management companies (see Contract Schools section). Through the Public Charter Schools Program, some federal funding is available to help new charter schools pay for planning, design, and startup costs. The program's funding has grown from \$6 million in fiscal year 1995 to \$145 million in FY 2000.

According to the U.S. Department of Education's *Guidebook for Charter School Operators and Developers* (June 2000), "In most cases, state departments of education apply to be part of the program and then award subgrants to developers and operators within their state. In states that have not elected to apply to the federal program, individual charter schools may, in some cases, apply directly to ED in partnership with their chartering agency."

In addition to funding problems, many newly forming charter schools also face opposition from local boards, state education agencies, and unions. Anecdotal evidence abounds concerning protracted battles between founders and district bureaucracies over rejected charter applications, transportation, building leases, student records, hiring practices, and funding allocations (Center for Education Reform; Kronholz 2000; Perez 2000).

**Governance and Operational Blues.** Abby Weiss, in her one-year report on a new charter school (Sarason 1998), notes problems with governance (creation of an efficient, collaborative decision-making structure) and isolation from other charter schools and

from the local community. Elizabeth Steinberger (1999) discusses strategies of districts and charters in three states (Colorado, Oregon, and Wisconsin) that "balance the quest for autonomy with the need for accountability."

Seymour Sarason (1998, 1999), a charter-school advocate, worries that "the superficial conceptual rationale for creating charter schools" will generate implementation processes that will doom the movement as another "flawed educational reform." For Sarason, creating any new educational setting is a complex process that requires sophisticated planning and anticipation of predictable issues and problems. Too often, founders' enthusiasm and optimism lead them to "underestimate the consequences of limited resources."

**Political and Statutory Constraints.** There are multiple political and statutory constraints on charter schools' progress. According to David Osborne (1999), charter schools' numbers remain limited because legislatures continue to stall, and "fewer than a dozen [state charter] laws create competition."

According to Bryan Hassel, "15 of the first 35 charter laws allow local school boards to veto applications," and 15 laws compromise charters' independence by incorporating them into their districts. Furthermore, "only 17 of the laws permit full per-pupil operating funding to follow the child from a district to a charter school"; only a handful "allow capital funding to follow the child." There are also caps on numbers of charters and/or restrictions on types of people or organizations that can propose charter schools.

In the eleven states allowing private schools to convert to charters, founders no longer have the luxury of "creating the best class of students from those who applied for admission," according to one operator of a converted Montessori school (Spencer 1999). By law, staff must accept everyone regardless of program fit, complete endless paperwork, banish privately held information, deal with enemies, beware false profits, and undergo government scrutiny.

## **Equity and Accessibility Problems**

Equity offers a troublesome caveat for many—especially since few charters have mandates to mix students (Lockwood 1997). As one education editor notes, both charter and magnet schools "tend to divide students by interests, abilities, and often by income" (Jenkins 1996). Charters do attract urban students because of their location, "but not the most vulnerable minority and disadvantaged students" (Schwartz 1996). Charter schools are not equally accessible to all students, since not all parents are proficient enough shoppers to select the best education deal for their children (Jenkins).

Even advocates admit that students with disabilities are not particularly well served by many charter schools (Nathan 1998). In Arizona, for example, only 4 percent of about 7,000 charter-school enrollees were being served as special-education students in 1995-96 (McKinney 1996). As federal and state progress reports show, many charters do not meet the needs of students who have individual education plans (IEPs) or develop

programs to attract these students. A U.S. Department of Education publication *A Study of Charter Schools* (1997) that explains charter educators' legal responsibilities, combined with state monitoring and more equitable funding mechanisms, may help to increase awareness of this problem.

Additionally, a publication by the Northwest Regional Educational Laboratory's Equity Center (1998) addresses specific equity challenges for public charters in seven areas: effects on public-school districts, selection of students, family involvement, funding, accountability, teacher certification, and special education. The center outlines recommendations for developing equitable practices, planning for equity, incorporating equity components and strategies, and assessing progress toward these goals.

Another publication by the Department of Education Office for Civil Rights (2000) uses a question-and-answer format to outline charter schools' responsibilities for applying federal rights laws to their admissions and operations.

On the plus side, an analysis of charter legislation by Carrie Y. Barron Ausbrooks (2001), an assistant educational administration professor at the University of North Texas, concludes that "states' statutes do an adequate job of ensuring that underrepresented groups have access to charter schools and that students' civil rights are not violated by charter schools." All but two of thirty-six statutes she reviewed have provisions ensuring that "economically disadvantaged, minority and special needs have the same access as other students to charter schools and the educational opportunities they provide."

Virtually all statutes have anti-discriminatory clauses. About one-third of the laws address elitism or racial/socioeconomic isolation concerns. According to Barron, the problems that arise are not with statutory provisions, but with individual charter schools' discretionary policies and practices governing admissions, geographic boundary restrictions, and dissemination of information to parents.

## **Governance and Regulatory Issues**

Nathan addresses other internal and external challenges for charter schools. Internally, charters need to develop valid, reliable, and inexpensive student assessments, discover the best governance systems, organize learning and teaching effectively, and continue to attract diverse student populations. Externally, the effects of multiple sponsors and strong charter laws should be monitored, along with for-profit companies' growing involvement in the movement. Nathan also believes that charter advocates must be wary of "questionable research," confront facilities issues, and win over skeptical educators and school-board members.

A group of educational economists studying governance structures expressed three major concerns related to charters' autonomy and regulation, market accountability, and accommodation of at-risk students (Geske and others 1997). Currently there is no guarantee that competition or "market accountability will ensure quality education," that

ineffective charters will not fight to "maintain their existence, or that low-income families will benefit as richly from market choices as higher-income families."

### **Accountability: Competing Formats and Philosophies**

In the maturing charter-school movement, accountability for school and student performance is fast becoming a primary concern for advocates, critics, researchers, policymakers, and practitioners. According to a report on the Charter Friends website (Schroeder, June 1999), "leaders of eight charter school resource centers have launched a major national initiative dedicated to strengthening [charter schools'] accountability and performance."

The Accountability Network, led by resource centers in Massachusetts, California, and Illinois, was planning to spread this effort to other states besides the other participants (District of Columbia, New Jersey, North Carolina, Texas, and Wisconsin). Charter Friends has consistently stressed charter boards' pivotal accountability role (Schroeder, August 1999) and has devised a comprehensive set of accountability guidelines, available on its website.

As shown in the statewide evaluation reports above and in the subsequent Contract Schools section, documented weaknesses in charter-granting agencies' oversight are all too common. According to Gerald Bracey (2001), "charter operators have often resisted producing financial or achievement data, even when this information falls under a state's freedom of information law."

The U.S. Department of Education's "Fourth Year Report" (2000) found that only 37 percent of charter schools sent a progress report to the chartering agency. Sixty-one percent sent a progress report to the charter board, but only 41 percent sent one to parents, and only 25 percent provided one to the community.

Lee Anderson and Karen Finnigan (2001), of SRI International, studied fifty chartering authorizers across the United States and found that there is a mismatch between the theory and reality of charter authorizer roles.

Charters are "being swept up in a rising tide of externally imposed accountability requirements (typically, mandatory participation in large-scale student assessment programs)." Anderson and Finnigan (2001) believe the new type of accountability that charter schools are trying to bring to public-school systems is getting lost in the shuffle; the "original vision of charter schools as unique institutions with individualized accountability plans is not likely to be realized in the current intergovernmental configuration of states and charter school authorizers."

Guidelines developed by a few proponents attempt to rectify this situation.

In his charter-school accountability guide, Bruce Manno (1999) describes four general criteria specified in all charter laws: "a school must (1) produce satisfactory academic



progress by its students on state- or district-wide tests and similar measures; (2) demonstrate success in meeting nonacademic goals, including those unique to the school's design and set forth in its charter or contract; (3) provide evidence that it is a viable organization, especially when this concerns the responsible use of public funds, but also including management and governance issues; and (4) comply with whatever applicable laws and regulations are not waived for charter schools."

Arguing that the American public is more conversant with the rule-compliance approach to accountability than with market-based approaches, Manno would agree with Anderson that "the reality of charter-school accountability has not caught up with the theory."

Aware of all these difficulties and competing expectations, Manno, Finn, and Vanourek (2000) have suggested a "transparent" system, Generally Accepted Accountability Principles for Education, to "help these schools succeed as genuine education alternatives." GAAP is a system of generally applicable, consensus-driven, and results-oriented standards to display a "picture window" of a school's production function and output goals to stakeholders—both customers and state authorizers.

According to Manno and associates, "transparency can facilitate and inform this notion of internal accountability," which, in turn, makes the notion of external market and regulatory accountability possible. They note that closure of a few charters (4 percent nationally) is one form of "accountability at work."

### **Staffing Policies and Practices**

To understand personnel practices in charter schools, economists Michael Podgursky and Dale Ballou (2001) surveyed 132 charter schools "drawn from a random sample of 200 schools open for at least three years" in seven (strong-law) states—Arizona, California, Colorado, Florida, Massachusetts, Michigan, and Texas (Thomas B. Fordham Foundation web site: <http://www.edexcellence.net>).

They concluded that charter-school policies and practices involving "hiring, paying, and firing teachers are more like private schools than traditional public schools" (Keller 2001). Compared with the characteristics of other public schools, charters generally have a lower student/teacher ratio, higher staff turnover (including more frequent dismissals), more part-time and inexperienced teachers, and more teachers lacking certification. About 31 percent of surveyed charters provided bonuses for math and science teachers, and 46 percent used merit or performance pay instead of salary schedules (Podgursky and Ballou 2001).

Although the authors call these practices "innovative," Deanna Duby, a National Education Association policy analyst, questions these assumptions (Keller 2001). Duby says claims that choice markets (especially those created by charters and vouchers) benefit both schools and the teaching profession need further debate and investigation.

## **Church-State Issues**

Church-state separation may be a major concern in some areas, according to Marc Bernstein (1999), a New York City superintendent. After his state adopted charter legislation, NYC "religious leaders began enthusiastically preparing themselves to establish charter schools." The Rev. Floyd H. Flake, former congressman and vocal public-education critic, "argued for skirting the constitutional barrier between church and state by offering religious instruction outside school hours."

In Chicago, Father Michael Pflieger was planning to close a parish school and open a publicly funded charter school operated by a board with possible links to the parish or Catholic archdiocese (Bernstein 1999). In Michigan, the ACLU and some parents have sued National Heritage Academies, a for-profit management company, for promoting religion in a Grand Rapids charter school (Michigan ACLU 1999).

According to Bernstein, litigation "inevitably will require the [U.S. Supreme] Court to rule on charter schools' use of church property, the participation of religious leaders on charter school governing boards and the attendance of charter school students at home and after-school religious education programs when the church's facilities are used to house the charter school."

## **Manuals and Guidelines**

The past few years have seen a proliferation of manuals and guides to help founders, parents, and staff negotiate common pitfalls and reap the rewards of establishing charter schools. Many, like the equity manuals mentioned above, are published or sponsored by the U.S. Department of Education.

Using such manuals, founders of charters can learn to create good working partnerships with sponsoring districts (Izu 1999) and the media (Blaha 1998); comprehend charter-school basics (Saks 1997; Leys 1999), the charter-school review process (Hassel 1998), enabling legislation (Billingsley and Riley 1999), and applicable federal civil-rights laws (U.S. Department of Education 2000); and become apprised of charter-school founders' typical leadership needs (Lane 1998).

## **Key Policy Issues**

In a paper examining the charter-school movement's general purposes, researchers at the Northwest Regional Educational Laboratory's Equity Center (1998) discuss several perspectives that focus on increasing student achievement—charter schools as a catalyst for systemwide change; as a component of comprehensive education reform; and as a means to enhance individual and group equity.

NWREL recommends three policy alternatives that are integral to the movement's success: (1) train and educate all parents to become actively engaged in choosing a school for their child; (2) provide mechanisms to transfer innovations and strategies from charter

schools and existing choice schools into the traditional public-school system; and (3) continue to emphasize accountability mechanisms and high academic achievement.

Finding "market-based social policy" an uncertain proposition, Thomas Lasley II and William Bainbridge (2001) say legislators should refrain from basing a major policy shift on enhanced parental satisfaction alone. Lawmakers should "cap charter initiatives until clear evidence of the social and educational consequences is available and understood." Moreover, "state governmental leaders need to manage the rate of change so that those most in need of help by the creation of new schools are not hurt if the 'experiment' fails." As Fiske and Ladd (2000) found in New Zealand, "expanding options without working to strengthen existing schools compromises the common good, because it potentially limits necessary guarantees—namely a place for each child in a free public school."

In his book *Inside Charter Schools: The Paradox of Radical Decentralization*, Bruce Fuller (2001) is concerned with charters as larger system-reform agents. He would like to help the charter movement "get a fair shot at true reform, organizational change that advances both democratic participation *and* children's learning." Noting that "high hopes must be tempered with sound evaluation and unrelenting attention to evidence," Fuller found that in the six alternative schools he studied, community-building was vastly more important to charter-school founders than competitive marketing strategies. For Fuller, "both the charter and parental choice movements are embedded in a wide debate over how civil society can construct warmer and more supportive forms of community."

## Contract Schools

Contract (or contracted-out) schools may be viewed as a privatization development that both parallels and builds upon the charter-school movement. As Max Sawicky (1997) points out, the U.S. public sector, including education, has always been privatized, since "cities don't build their own garbage trucks and schools don't write their own textbooks." School districts are increasingly contracting out for support services (like payroll processing and student transportation), for instructional services (like Berlitz International language programs), or, most controversially, for management services to operate programs or entire schools.

Paul Hill and associates (1997) define *contract schools* as "publicly funded schools operated by an independent group of teachers and administrators under a contract with public agency." In their book *Reinventing Public Education*, they argue that every public school should be contracted out to independent providers. The contract would define each school's mission, indicate its level of public funding, and state how it would be held accountable for results.

Under Hill's system, contractors could run the gamut from private-sector entrepreneurs and large business enterprises to teacher unions, higher education institutions, not-for-profit organizations, parent associations, child-advocacy agencies, religious organizations, school administrators, and assorted individuals with good ideas. To

minimize risks of incompetency, bidders would have to acquire an "instructional contractor's license."

According to Hill and his colleagues (1997), contract schools have advantages over charter schools, because contract schools' funding is certain, initiation is less marginal, and "contracting creates clear, reliable, and legally enforceable relationships between school operators and public officials." As in charter schools, contracting encourages creation of independent school operators and enables school boards to sponsor schools they do not manage themselves. Contracting is really an "evolutionary development of the charter idea, focusing on the school as the main unit of performance in public education," but allowing more clearly defined public oversight.

### **Investment in Education Businesses**

During the late nineties, about \$70 billion was spent yearly on all U.S. for-profit education sectors, "from textbooks and corporate training to child-care centers and postsecondary schools" (Walsh, December 15, 1999). Only recently have these markets and privatization ventures (the product and service sectors) expanded to include actual instruction of K-12 students. This new "schools sector" posted revenues of \$28 billion in 1998, according to an April 1999 EduVentures report (Walsh, December 15, 1999).

In November 1999, Edison Schools Inc. (formerly the Edison Project, founded by Chris Whipple) raised \$122 million in an initial public stock offering—a milestone for for-profit education, despite Wall Street's lukewarm response (Walsh, December 15, 1999).

By early 2001, the supercharged economy had slowed drastically, and seed money for education-related business was drying up. According to Mark Walsh (August 8, 2001), venture investments in education businesses "declined steadily since a peak of just over \$1 billion for the first quarter of 2000"; by the second quarter, "the figure had fallen to \$247 million," with nothing going to businesses focused on K-12 instruction. The first quarter of 2001 posted only \$134 million in K-12 venture investments, compared with \$734 million during 2000. Insufficient venture capital means less first-stage funding for bright ideas and increased merger and acquisition activity (see below).

### **Pioneering Education Management Ventures: Then and Now**

Public Strategies Group, Inc., the first private company to lead an entire school system, succeeded in improving attendance, discipline, achievement, and family involvement under its five-year contract with Minneapolis schools (Bradley 1997, Hutchinson 1997).

Since 1995, National Heritage Academies, based in Grand Rapids, Michigan, has grown from managing one small charter school to operating 22 charters with 7,900 students in Michigan and North Carolina (Schnaiberg 1999).

Advantage Schools, Inc., founded in 1996 by entrepreneur Steve Wilson, favored packaged, generously scripted direct-instruction techniques at charter schools it managed

in Worcester, Massachusetts, and 15 other urban districts with fairly high student-aid formulas. Advantage's plan (as of fall 2000) was "to offer a low-cost education to the poor, and, by exploiting the most recent educational reforms, get taxpayers to finance the entire enterprise" while turning a 20 percent profit (Kolbert 2000). Following the announcement of possibly inflated test score gains in spring 2001, Wilson was fired, and Advantage was taken over by Mosaica Education, Inc., a New York-based firm that specializes in managing nonunionized charter schools (Bracey 2001, Golden 2001).

Nobel Learning Communities operates 151 private schools and public charter schools in 16 states. The company bought two Arizona charter schools and a for-profit business college from financially troubled Tesseract in April 2001 (Walsh, August 8, 2001).

In 1995, Beacon Education Management Inc. (then known as Alternative Public Schools) was hired by Wilkinson (Pennsylvania) School District to manage one of its three elementary schools. The company ran into trouble with the teachers' union after replacing the entire faculty with its own staff. In 1998, the contract was terminated when a state court ruled that for-profit management concerns violated state law. In 2001 Beacon operated 29 charter schools serving 10,000 students (Walsh, September 12, 2001) and was "bidding on contracts to run unionized charter schools" (Golden 2001).

Most media attention has focused on the triumphs and troubles of two leading companies—the Edison Project, based in New York City, and Minneapolis-based Tesseract Group Inc. (formerly Educational Alternatives, Inc.). Edison Schools Inc. (as Edison Project), which promotes a respected year-round education program, has had fairly smooth sailing "in its five years of managing public schools for districts and charter groups" (Walsh, May 19, 1999). In 2001, the company operated 136 public schools serving some 75,000 students in 53 cities and 22 states (Gewertz 2001).

Recently, Edison won some prized contracts with Michigan and Pennsylvania districts (after taking over LearnNow). The company has experienced some problems managing its Boston charter school and more serious setbacks in New York, where voters squelched its plans to manage five elementary schools, and in San Francisco, where Edison drew fire for allegedly weeding out minority and disabled students "to inflate performance ratings" (Grimes 2001, Molnar and Reaves 2001). Edison was forced to terminate its contract with the San Francisco Schools and now operates the elementary school in question under a state charter; additionally, Edison must pay rent to the district and will lose \$235,000 in funding under a desegregation consent decree (Walsh, July 11, 2001).

Edison recently regained the spotlight for its "\$2.7 million contract to review Philadelphia schools" (Johnston 2001). According to the Center for Education Reform website, Edison found that the district "spends too much on maintenance and other nonacademic functions, poorly deploys teachers, and does not track the effectiveness of its many curricular programs." In early November 2001, Pennsylvania's interim governor proposed that Philadelphia schools be taken over by a private management company—to the consternation of city leaders. Under Governor Schweiker's plan, the company would answer to a state-appointed five-member commission that would replace the school

board. The EMO would be allowed to replace the district's top fifty-five leaders and have most say over the district's worst performing schools. Although the plan doesn't specify Edison as the chosen manager, the company is anxious to land this contract and direct the nation's largest public-school privatization effort (Gewertz 2001).

Starting in 1991, Tesseract Group Inc., the former Educational Alternatives, Inc., "won contracts with troubled public school districts in Baltimore, Miami, and Hartford," but lost them over disputes involving finances and bureaucratic constraints (Education Week website—Privatization; Stecklow). The company changed direction in the late nineties, opening a few private schools in Arizona, Minnesota, New Jersey, and Indiana. After moving to Scottsdale, an affluent Phoenix suburb, and despite charging high tuition and student transportation fees at its charter and preschools, Tesseract went broke. In October 2000, the company sold off its schools and filed for Chapter 11 bankruptcy protection (Walsh, June 7, 2000).

### **EMOs: Entrepreneurial Spirit Plus Union Cooperation**

According to Stecklow, many education management companies are finding the fast-growing charter-school movement "a more hospitable and entrepreneurial education market." They are already operating 10 percent of all charter schools. In Michigan, the figure is a hefty 70 percent. In some cases, companies are taking over from burnt-out founders struggling to keep schools afloat. When a math and science charter school in Freeland, Michigan, closed after only one year, parents were glad to hire Mosaica Education, Inc. to run a new one in Saginaw. The company brought expertise in curriculum, management, and much-needed financial backing (Schnaiberg 1997).

To gain partners in their entrepreneurial rescue efforts, some for-profits are turning to teacher unions, once deemed "pathological" and obstructive by Advantage Inc.'s Steve Wilson (Golden 2001). The CEO of Edison, with 40 percent of its 113 schools sporting union contracts, has not found unionized teachers particularly inflexible or anti-reform. The new spirit of togetherness, according to Golden, stems from self-preservation and economic opportunity. EMOs view regular schools as offering "a wider and more lucrative terrain...than charter schools," since startup costs and other capital expenses are avoided or financed by districts. Also, companies can expand faster by acquiring entire districts to manage, instead of having to launch charter schools one school at a time.

In the case of the Inkster, Michigan, system, teachers preferred a partnership with Edison to tackling the uncertainties of a state takeover; in Chester-Upland, Pennsylvania, the union again sided with Edison rather than risking district schools' conversion to nonunionized charters. As previously mentioned, Beacon Education Management is spearheading a drive to acquire unionized public schools. Advantage Inc. had the same idea, until it was taken over by anti-unionist competitor Mosaica Education, Inc.

## Evaluating the Performance of Contract Schools

Although "private-management efforts have generated intense scrutiny," it is difficult to judge their success or failure—partly because "few of the jurors approach the task free of preconceived notions" (Walsh, October 20, 1999). Contractors eager to show progress often exaggerate the importance of modest gains, while opponents seize any excuse to end the contract.

**Edison Schools Inc. Test Score Gains.** A company report issued in spring 1998 touted steadily improving student performance in the twenty-five schools Edison operated (Walsh, March 4, 1998). The American Federation of Teachers found that "academic results were more mixed than the company suggested."

A more recent report, partly prepared by RAND Corporation, states that many Edison schools are continuing to raise test scores as the proportion of students receiving free- or reduced-price lunches rises. Of the 74 Edison-operated schools open during 2000-01, "62 or 84 percent were achieving at higher levels than where they began" (Johnston 2001). Scores on criterion-referenced tests have risen "an average of 6 percentage points every year between 1995 and 2001." However, schools' individual scores and aggregate results were not compared with results for similar schools in their districts. RAND corporation will do a three-year study to disclose those results by 2004.

**Managerial and Governance Practices in Massachusetts.** A study that examined franchising patterns in four Massachusetts charter schools concluded that "charters managed by EMO's are different from charters managed by other organizations and individuals across the country" (Rhim 1998). The main differences are in governance and size. Charters managed by Sabis and Edison have "relatively prescribed governance structures and academic programs." Although teachers may have considerable autonomy, existence of an outside contractor creates a virtual "central office" atypical of other charter schools. This additional layer (besides the board of trustees) may result in greater regulations.

EMO-run schools, such as Edison's 1,000-student Renaissance Charter School, are larger, perhaps due to private firms' desire "to maximize their space and realize economies of scale" (Rhim). Regular charter schools tend to house about 100 to 200 students.

**Recruitment and Cost-Cutting in Michigan.** Studies from the University of Michigan suggest that the state's charter schools "were targeting niche markets of parents interested in specific academic programs," shaping "their enrollments by requiring applications and admissions interviews," and providing fewer special-education services than other public schools (Walsh, Arsen and others 1999, Sykes and others 2000). Although researchers did not target for-profit companies, 70 percent of all Michigan charters are run by EMOs.

Another study of eleven privately run charter schools in western Michigan discovered some cost-cutting strategies employed by three companies—the Educational Development Corporation, the Leona Group, and Malone Management (Dykgraaf and

Lewis 1998). Despite receiving transportation funds for pupils, only one out of eleven schools provides students with buses. In most schools, parents were persuaded to waive their children's right to special-education entitlements. In ten schools, "special-education students account for only 3 percent of total enrollment, far below the normal 10 to 13 percent in traditional public schools." Students were receiving only minimal services, specifically speech therapy.

Absence of free busing and special programs has consequences for students living in neighborhoods beyond a charter school. Poor students' choice of schools is clearly diminished by lack of transportation. Also, parents may have difficulty getting a list of area charter schools under private management—a further limit on student access.

**Problems in Michigan and Arizona.** When Thomas Toch (1998), guest scholar at the Brookings Institution, visited three dozen charter schools in Michigan and Arizona, he found "a picture of educational entrepreneurialism" that captured both the benefits and the drawbacks of any market-based enterprise. Although the best charter schools were enthusiastically pursuing innovation and excellence (see "Exemplary and Innovative Programs" in the Charter Schools Section) and inspiring surrounding districts to reform their programs, these were exceptions. The vast majority "had problems rarely encountered in traditional public education.

According to Toch, in most Arizona and Michigan charters, "curricula and teaching are weak, buildings are substandard, and financial abuses are surprisingly prevalent." The companies running Arizona's high-school charters (chains such as Excel Education Centers Inc. and the Leona Group) capitalize on Arizona's four-hour attendance requirement for high-schoolers. These companies promise "marginal" students (low-achievers, problem kids, and truants) "a swift and simple route to graduation." Many increase revenues by operating multiple four-hour sessions daily and "substituting self-paced computer instruction for a regular teaching staff."

Academic standards for these and other for-profit high-school charters are low; many teachers are low-paid beginners; and labs, libraries, and even conventional school supplies are scarce. Profiteering (in the form of excess rental charges, enrollment misrepresentations, and sponsor chartering fees) and nepotism are commonplace in both Michigan and Arizona charters. A few converted private schools that shun outsiders may be fostering "social balkanization" and using charter laws to "create public subsidies for private schooling."

Arizona charters are plagued by lack of rigorous oversight, Toch (1998) claimed. Local school systems have not closely monitored the charter schools they sponsor, and chartering boards have been reluctant to tackle abuses. Toch discovered that over three-dozen schools "identified as having education programs bad enough to close were left alone on the grounds that they weren't physically endangering students or defrauding taxpayers."



## **Profitability**

Judging EMOs' performance is difficult, since "many young companies are privately held and not required to report their financial data to the public" (Walsh, November 24, 1999). Sylvan and Nobel Learning Communities are profitable. Tesseract is now out of the picture, since filing for Chapter 11 bankruptcy in October 2001. Edison may fail as an EMO (it lost \$38 million on fiscal 2001 revenues of \$376 million), but might still profit from marketing products such as new curricula, professional development programs, and educational software (Levine 2000).

Beacon Education Management Inc. is said to be close to profitability, despite losing \$2.7 million on revenues of \$16 million in 2000 (Walsh, September 12, 2001). Beacon was hoping to raise \$33 million in its initial public offering in July 2001, "but the IPO was pulled at virtually the last minute, with Beacon and its underwriters citing poor market conditions" (Walsh, September 12, 2001). Neither Mosaica nor Advantage has made its losses public (Walsh, September 12, 2001). Despite promises of increased revenue from charters (and Internet courses), most EMOs to date are operating in the red.

Business analysts such as Merrill Lynch say the education field today resembles the health field of yesterday: "a highly fragmented cottage industry, inefficient, with limited professional management" and little use of technology (Walsh, November 24, 1999).

Economist Harry Levin, director of the Center for the Study of Privatization in Education at Teachers College in New York, says business acumen is not sufficient to salvage a failing school and turn a profit (Kronholz, February 12, 1999). Because most states require lotteries to fill seats and most charters are in inner cities, "charters face the same problems that traditional public schools find so insolvable." Many educators believe "profits can be obtained only by depriving children of services and opportunities that would help them to succeed in school" (Plank and Sykes 2000).

## **Competition and Efficiency**

Evidence from Massachusetts (and other states) suggests that "while charter schools have 'competitors' for students, EMOs are not competing for contracts in the economic sense" (Rhim 1998), but are able to sew up contracts during the application process. Rhim believes policymakers should act to "infuse an appropriate amount" of competitive bidding into the contracting process.

EMOs' claims of greater efficiency should also be examined. According to three Michigan State University researchers, for-profit firms earn their money in three ways: by reducing labor costs (via cuts in employment and compensation); by using economies of scale (operating larger facilities and providing standardized curricula, financial, and administrative services); and by providing fewer student services (like transportation, school lunches, intramural athletics, band and orchestra, and extracurricular activities) (Plank and Sykes 2000).

Sharp business practices are favored by some private companies to ensure profits (Johnson 2001). These practices include contracting consulting services for predetermined fees; arranging that all cost savings from contracted services flow to contractors; appending a fee apart from inclusion of the district's labor and materials in the contract; including a profit or markup on equipment and supplies purchased on the district's behalf; inflating first-year costs with one-time expenses; and using proceeds from sale of corporate stock or securities.

To avoid misunderstandings and fiscal mismanagement, Jon Schroeder (August 1999), of the Charter Friends National Network, recommends that districts consider key issues before contacting for school-management services. School-district officials or charter-school boards should ascertain which services are being purchased, who has key decision-making authority, the terms of the contract, how the contract will be monitored, how the management company will be compensated, how the budget will be set and revised, who owns the school's physical and intellectual property, and how this property will be divided if the contract is terminated.

The National School Boards Association has issued guidelines (Johnson 2001) to help school districts determine whether a private firm could provide the service or goods more efficiently or less expensively than the district; whether contacting will affect other district services; whether a sufficient supply of firms exists to ensure competitive bidding; and whether unsatisfactory contractors can be replaced.

EMOs' rhetoric doesn't always match reality, according to a University of New Mexico study that examined website design, imagery, and a language of six major for-profit companies: Advantage, Bacon, Edison, Leona Group, Mosaica, and National Heritage Academies (Pini 2001). An EMO might "promise competitiveness, efficiency, and consumer choice, but may also ignore the concerns of equity, citizenship, and solidarity." Corporate marketing strategies using misleading advertising, oversimplified evidence, and evocative rhetoric may obscure or distort differences between corporate goals and public-education benefits. EMOs' claims for having smaller classes, longer school days, and greater technology use may be accurate; however, EMOs' need for constant corporate expansion to remain profitable; tendency to hire young, experienced, and nonunionized teachers; and reliance on parental volunteer work do not appear in promotional literature (Pini 2001).

As noted elsewhere (see Charter Schools section), the most powerful component of the service-reduction strategy is "to specialize in the education of less costly students." Elementary students are less expensive to educate than secondary students, and teaching regular K-12 students costs less than teaching limited-English or disabled students. States (such as Michigan) that provide the same subsidy for every student in a local district provide a strong incentive to educate mostly "mainstream" elementary students (Plank and Sykes 2000).

Some companies that do target minority and disadvantaged students weed out hard-to-teach youngsters or use scripted, unimaginative teaching and disciplinary techniques.

Concentrating large numbers of poor black and Hispanic kids in these "alternative" settings (because their needs are supposedly different from those of kids from affluent suburban families) may expand urban parents' limited schooling choices, but have a ghettoizing effect in the long run, states Kolbert (2000).

One motivation for a district in choosing to contract out some of its services might be to improve its schools through competition and the diffusion of innovation. This may happen even without being hired, as Edison discovered in spring 1999. The company's mere proposal to launch a 600-student charter school in Toledo, Ohio, inspired the district and local AFT union to create their own innovative school. The K-4 Grove Patterson Academy enrolls 220 students, has a waiting list of 400, and offers Success for All, Spanish and German language instruction, and home computers for students. All are hallmark Edison program features

## **Intersectional Choice Plans**

### **Public Voucher Plans**

The concept of educational vouchers originated in the early 1960s, when Milton Friedman argued that vouchers would improve educational efficiency. Parents would be given vouchers equal to the per-pupil expenditure in the public schools. These vouchers could be used at whichever school parents wished their children to attend, whether public or private.

In 1971, while working on California's famous *Serrano* case, law students Jack Coons and Stephen Sugarman recommended that vouchers be used for students in poor districts to remedy unconstitutional school-funding inequities (Miller 1999).

Voucher plans have been criticized on legal and equity grounds, as the following discussion makes clear.

In 1969, the Office of Economic Opportunity launched the Alum Rock (California) voucher project, which eventually became a limited open-enrollment program. The problem was that most of the parents (as in many other studies) preferred neighborhood schools instead of alternative schools. In sum, neither school personnel nor parents acted the way free-market theory predicted they would (Ascher 1996).

Arnold Fege, director of government relations for the National PTA, views the voucher issue as a "battle for public resources, with \$386 billion at stake" and a private sector anxious to grab its share (Saks 1997). For others, the key public issue is deciding who has the right to spend the money—public providers or the consumers themselves?

## Public Opinion Polls

In the September 2001 Phi Delta Kappa/Gallup Poll (Rose and Gallup 2001), 62 percent of respondents opposed allowing parent to choose a private school for their children to attend at public expense, compared with 56 percent the previous year, and 34 percent were in favor, compared with 39 percent in 2000. Opposition declined between 1993 and 1998, but has gradually increased since fall 1999, when 55 percent opposed public vouchers and 41 percent favored them.

In both the 1998 and 1999 Phi Delta Kappa/Gallup Polls (Rose and Gallup 1998, 1999), 51 percent of the public said they would favor a proposal for total or partial government tuition to send their children to private or church-related schools. In 2000 and 2001, public approval declined to 45 and 44 percent, respectively. In 1999, 61 percent of public-school parents favored such plans, compared with 56 percent in 1998. By 2001, public-school parents' approval had dropped to 52 percent.

In 1999, 74 percent of the public believed that private schools accepting public funds should be required to admit students from wider backgrounds and ability levels; 77 percent believed that publicly supported private or church-related schools should be as accountable to the state as public schools are.

In 2001, public and parental support for making publicly supported private schools as accountable as public schools was the highest ever, at 82 and 83 percent, respectively. Additionally, both the general public and public-school parents (72 and 73 percent, respectively) solidly support reforming the existing public-school system over seeking alternatives to it. For the first time in these polls' thirty-three-year history, "a majority of respondents assign either an A or a B to the schools in their communities"(Rose and Gallup 2001).

These sentiments are echoed in three other polls.

**Public Policy Forum.** According to a Public Policy Forum survey, Ohio and Wisconsin taxpayers "favor expanding voucher programs in their states that involve private schools, but believe those schools should be held accountable to the public" (Schnaiberg, February 18, 1998). Respondents identified the need for guidelines that would (1) require choice schools to make public their missions, philosophies, governance structures, curricula, and other relevant characteristics; (2) create public boards to publicize school information; and (3) revoke taxpayer money if they fail to meet reporting requirements.

**Hart Research Associates.** In 1998, a Peter D. Hart Research Associates Poll was commissioned by the American Federation of Teachers and administered to a random sample of over 800 respondents (Peter D. Hart Research Associates Poll 1998). Although support for the notion of "allowing students and parents to choose a private school to attend at public expense" drew mixed responses (38 in favor and 54 percent opposed), "support for accountability was overwhelming." More than 80 percent favored requiring schools to meet basic curriculum and teacher-qualification standards. Voucher schools

would also have to avoid racial and religious discrimination, meet health and safety conditions, employ only certified teachers, disclose their budgets, use the same tests as public schools, and comply with the Americans with Disabilities Education Act.

**Zogby.** A poll of 1,211 adults (including an oversample of African-Americans) conducted by Utica-base Zogby International found only "paper-thin" support for vouchers (National School Boards Association News Release, September 25, 2001). In this telephone poll, "a huge majority of those surveyed, up to 90 percent, say that private schools accepting vouchers must meet the same accountability standards as public schools" (NSBA News Release 2001). Although equal proportions of those surveyed (48 percent) favored or opposed vouchers, nearly 40 percent of supporters would "withdraw their support if it results in a loss of tax dollars to public schools" (NSBA 2001). Also, 57 percent of African-American respondents opposed vouchers, and 41 percent favored them.

Just 12 percent of all adults and only 5 percent of African-Americans surveyed selected vouchers as the best way to improve public schools; respondents clearly preferred that "tax dollars be invested in strategies such as reducing class sizes and strengthening teacher quality."

**Public Agenda.** Yet another poll, Public Agenda's (2000) comprehensive survey of national attitudes on public-school alternatives, cautions against misreading public views on vouchers and charter schools. The vast majority of citizens, including many Milwaukee and Cleveland residents, know little about these educational alternatives.

## **Legislative Action and Referenda**

On the legislative front, voucher proposals were defeated in Congress and in Washington, Oregon, Colorado, Texas, and California during the mid-1990s (Saks 1997, Johnston 1997) and more recently in New Mexico and Pennsylvania (Pipho 2000). In June 1999, the Florida legislature enacted a statewide voucher system for up to 150,000 disadvantaged students attending schools rated as "failing" (Elam 1999).

At least twenty-five states introduced voucher bills during the 1999-2000 session (Pipho 2000 ). Aggressive, ongoing campaigns were being waged in Michigan, Colorado, Texas, Pennsylvania, California, New Mexico, Vermont, and Washington (Johnston 1997; Bowman, March 1, 2000). At least seven of these states echoed Florida's approach—using school performance and accountability arguments (rather than pleas for fairness and increased choice for poor families) to justify voucher proposals (Bowman, March 1, 2000).

In fall 2000, Michigan and California voters defeated voucher proposals by wide margins.

At the polling booth, Americans are not showing tax support for parochial or private schools (Menendez 1999). Since 1966, this issue has been rejected twenty-three out of

the twenty-four times it was considered by the electorate. Various voucher/tax-credit schemes have been rejected by two-thirds of voters in twelve out of thirteen states and the District of Columbia. The exception was South Dakota. Legislatures in Minnesota, Arizona, and Iowa have enacted education tax-credit plans (See Tax Credits and Deductions section) (Fuller and others 1999).

## Constitutionality Issues

The best-known publicly funded voucher programs—in Milwaukee, Wisconsin; Cleveland, Ohio; and Florida—have been subjected to court scrutiny in recent years, culminating in the June 2002 Supreme Court decision that Cleveland's voucher program is constitutional.

**Milwaukee, Wisconsin.** The Milwaukee Parental Choice Program (MPCP) began in 1990. It offered \$2,900 in private-school tuition for children from low-income families. Religious schools were added to the program in 1995 (Walsh, October 3, 2001). By 2002, voucher amounts had increased to over \$5,000, and enrollment reached nearly 11,000 students at 106 schools (Norquist 2002).

In June 1998, the Milwaukee State Supreme Court, based on *Agostini v. Felton* (a U.S. Supreme Court ruling allowing Title I aid to disadvantaged parochial-school students), upheld the program's inclusion of religious schools (Walsh, April 15, 1998). The court ruled that "the amended MPCP does not violate the Establishment Clause because it has a secular purpose, it will not have the primary effect of advancing religion, and it will not lead to excessive entanglement between the state and participating sectarian schools" (Excerpt from the ruling; Walsh, April 15, 1998).

In November 1998, the U.S. Supreme Court declined to review the Wisconsin ruling—a disappointment for critics and advocates alike (McCarthy 2000). It agreed, however, to review the Cleveland program and ruled in June 2002 that it was constitutional.

**Cleveland, Ohio.** Enacted by the Ohio Legislature, the Cleveland Scholarship and Tutoring Program was implemented in 1996 in response to low academic scores in the city's schools. This program targets low-income families, has embraced religious schools from its inception, and provides tutoring assistance. By 1997-98, vouchers worth up to \$2,250 were available for 4,000 K-5 students (Metcalf and Tait) in 56 private schools, 46 of which are religious (Archer, January 12, 2000). In 2000, "about 96 percent of the students were using the vouchers to attend religiously affiliated schools" (Walsh, October 3, 2001).

Because the overwhelming majority of the schools funded by the public program were sectarian, Cleveland residents filed a lawsuit declaring it a violation of the First Amendment's Establishment Clause. Voucher proponents asserted that the program did not endorse religious schools per se because it left up to the participants the choice of which school to attend, whether religious or nonreligious. The case challenged that claim, stating that, as a matter of practice, the \$2,250 tuition limit was enough to cover only the

fees of religious schools, which often receive additional support from private donations and consequently have lower tuition needs than independent nonsectarian private schools (Biskupic and Henry, June 27, 2002).

After a state appeals court ruled that the program violates federal and state bans on government aid to religious institutions, the case ended up in the Ohio Supreme Court. In December 1999, U.S. District Judge Solomon Oliver, Jr., ruled that the Cleveland plan "violates the U.S. Constitution's ban on a government establishment of religion" (Archer, January 12, 2000). Cleveland took the case to the U.S. Sixth Court of Appeals, which upheld the Ohio Supreme Court's ruling.

In June 2002, in the last ruling on the last day of the annual session, a divided panel of the U.S. Supreme Court delivered its decision for what had been the most controversial case of the year. The High Court's conservative majority, headed by Chief Justice William H. Rehnquist, prevailed in a 5–4 ruling that Cleveland's voucher program does not constitute the establishment of religion and is therefore constitutional (*Zelman v. Simmons-Harris*, *Hanna Perkins School v. Simmons-Harris*, *Taylor v. Simmons-Harris*). Rehnquist announced that the Court found that Cleveland's program was "one of true private choice" that is "neutral in all respects toward religion" because participants still have the option of attending a public school, magnet school, or nonreligious private school (*Zelman et al. v. Simmons-Harris et al.*).

He received the complete backing of Justice Sandra Day O'Connor, who was widely expected to be the swing vote in the case because she had qualified her earlier support of the majority stance by insisting on the distinction between programs that send funds directly into religiously affiliated institutions—giving the appearance that the government endorses religion—and those that give the money to individuals and let them decide where to spend it (Fletcher, February 20, 2002). Some had expected her to limit the impact of the case by including some provisos in a separate assenting opinion, but no such caveats were made (Biskupic and Henry, June 27, 2002).

Justices Antonin Scalia, Anthony Kennedy, and Clarence Thomas joined Rehnquist and O'Connor in the decision (*Zelman et al. v. Simmons-Harris et al.*).

The High Court has given increasing amounts of leeway in cases involving the diversion of public funds to religious schools within the past several decades. In 1968, it ruled that the government could supply nonreligious textbooks to private school students (Schulte, June 28, 2002). Eighteen years later, it approved one student's use of a state vocational scholarship to attend a religious institution to become a pastor. And in 1993, it decided that federal money can pay for sign-language interpreters for deaf students at parochial schools. Rehnquist asserted that the Court's ruling in the Cleveland voucher case is consistent with that line of precedents (Lane, June 28, 2002).

Among the dissenters in the Court's liberal minority was Justice David Souter, who lamented the decision to support a program he feels forces taxpayers to subsidize faiths other than their own while corrupting religious institutions by making them dependent on

government funds and opening the door to future government interference (Lane, June 28, 2002). Several religious groups, including the Council on Religious Freedom and the Seventh-Day Adventist Church State Council, oppose the decision on the same grounds (Biskupic and Henry, June 27, 2002).

Justice Stephen Breyer pointed out that the ruling may not even help the low-income students for whom it was intended, if their only choice is between an inadequate public school and a private school that teaches religious beliefs contrary to their own (Biskupic and Henry, June 27, 2002). Souter and Breyer were joined by Justices Ruth Bader Ginsburg and John Paul Stevens (*Zelman et al. v. Simmons-Harris et al.*).

The Supreme Court's ruling has breathed new life into the campaign for voucher programs across America by putting the constitutionality question to rest. President George W. Bush, whose support gave a significant boost to Cleveland's case, called the ruling a "landmark victory," comparing its importance to the *Brown v. Board of Education* case that called for the desegregation of American schools in 1954 (Milbank, July 2, 2002).

The Supreme Court, which approved the constitutionality of only those voucher programs similar to Cleveland's, has passed the issue into the hands of state legislatures across the United States. The eight states in which advocates invest the most hope for passing voucher laws are Minnesota, Colorado, Texas, Arizona, Indiana, Virginia, Alabama, and Utah (Frieden, June 27, 2002). And only a few hours after the delivery of the Supreme Court's decision, House Majority Leader Rep. Richard Armey (R-Tex.) reintroduced a bill to institute a voucher program in Washington, D.C., that is identical to one that was passed by Congress in 1997 but vetoed by then-president Bill Clinton (Schulte, June 28, 2002).

Many states' constitutions have their own clauses establishing the separation of church and state, so the constitutionality question may arise again in state supreme courts, though the High Court's precedent will be difficult to supersede.

**Florida.** A plan enacted by the Florida Legislature in June 1999 could qualify "as many as 150,000 of the state's 2.3 million K-12 public school students for vouchers," at a cost of \$750 million (Elam 1999). The Opportunity Scholarship Program "allows children in schools deemed failing by the state for two years out of four to receive vouchers to attend other public schools or private schools, including religious ones" (Walsh, October 3, 2001).

The program was temporarily derailed by a March 2000 decision by Florida circuit court Judge L. Ralph Smith, who found that "giving students taxpayer-financed vouchers for private-school tuition" violated the Florida Constitution's guarantee of a "uniform, efficient, safe, secure, and high-quality system of free public schools" (Wilgoren 2000). In October 2000, a three-member state appellate panel overturned Judge Smith's decision and reinstated the program (Sack 2001). In April 2001, the Florida Supreme Court



declined to review a case challenging the program, letting stand the appellate court's decision.

So far, only fifty-eight students (from failing Pensacola schools) have used vouchers for private schools; seventy-eight students transferred to other public schools (Walsh, October 3, 2001). A separate program, also enacted in 1999, "provides vouchers permitting disabled students to attend private schools or out-of-district public schools"; about 4,000 are expected to take advantage of the program during 2001-02.

**Maine and Vermont.** In Maine and Vermont towns lacking high schools, informal voucher plans have allowed secondary students to attend public schools or approved private schools outside their home districts since the 1870s (McCarthy 2000, Walsh 2001e). In both states, higher courts have turned back citizens' efforts to add religious schools to the list of options (McCarthy; Mathis and Merriam 1998; Walsh, October 20, 1999).

The experiences of these five states suggest that including parochial schools in voucher plans is extremely controversial—especially because 80 percent of private schools have religious ties (Hadderman 2000). The High Court's increasingly relaxed interpretation of the establishment clause is no guarantee that voucher proponents will prevail. As Wilgoren notes, "vouchers could still be blocked by state constitutional promises of a free public education."

States with "Blaine Amendment" type laws that forbid public funding of sectarian schools will offer tough resistance (Viteritti 1998). Ironically, laws that "erupted out of a spirit of religious bigotry" seeking to promote Protestantism in public schools in the early twentieth century "eventually became an emblem of religious freedom" (or, as some have said, freedom from religion) in some states. Courts do exercise discretion. In Arizona, for example, the state supreme court's 1999 decision upholding tax credits to benefit private-school scholarship funds overlooked a Blaine-like constitutional provision forbidding tax support of religious schools (Walsh, October 13, 1999).

## Research Results

**Disagreement in Milwaukee.** In 1996, researchers examining the Milwaukee choice program drew diametrically opposite conclusions. A study by Jay P. Greene and Paul E. Peterson "contradicts 5 years' worth of evaluations by John Witte and his colleagues at the University of Wisconsin-Madison" (Saks 1997). Witte's evaluations found no achievement differences between voucher and comparable public-school students for any given year. Comparing selected students with those not selected for the voucher program, Greene and Peterson found that voucher students' third- and fourth-year reading scores were 3 to 5 percentage points higher, and their math scores were 5 and 12 percentage points higher.

The validity of both studies has been under attack. Voucher opponents have championed Witte's findings as proof of vouchers' failings. Proponents have trumpeted Greene and

Peterson's findings as demonstrating vouchers' effectiveness. Different research designs have complicated efforts to evaluate these studies objectively.

In 1997, the Milwaukee data were reanalyzed by Cecilia Rouse of Princeton University (Fuller and others 1999). Comparing annual gains for a larger sample of voucher students with both Milwaukee Public School students and students denied admission to the voucher program, she "found a modest gain of 1.5 to 2.3 percentile points per year in math for the voucher students, but no statistically significant differences in reading scores." Rouse's methodology apparently overcame some weaknesses of Greene's analysis, but did not fully compensate for selection bias (contributions of family and home factors) (Fuller and others).

Expanding her study, Rouse examined Milwaukee student-achievement data in the city's magnet schools, regular attendance area schools, and a group of attendance area schools with small class sizes and supplemental state funding (the P-5 schools). She "found that the P-5 schools performed as well or better than students in choice schools" (Molnar 2000; Rouse 1998).

**Confusion in Cleveland.** Preliminary evaluations of the Cleveland Scholarship Program have been equally contentious. A study by Jay P. Greene, Paul E. Peterson, and William G. Howell "found achievement gains among students at 2 out of 55 schools in the program, while a report from the American Federation of Teachers called the study a 'cruel hoax' " (Viadero, August 6, 1997).

According to Greene and associates (1997), K-3 students at two specially created private schools gained "5 percentile points on the reading test and 15 percentage points in math." The AFT claims that "testing students from fall to spring exaggerates student gains." Others, such as Harvard University education professor Richard Elmore, argue that such testing is valid. The AFT also claimed that students at existing private schools "had crowded out some public school students who wanted to attend those schools" (Viadero, August 6, 1997).

Preliminary results from a state-commissioned study led by Kim Metcalf of Indiana University showed that 94 third-grade voucher recipients did no better academically than 449 third-graders of similar background who attend Cleveland Public Schools (Walsh, April 15, 1998). However, Metcalf did find "somewhat higher achievement of fourth-grade choice students in science and language" (Drury 2000).

Interestingly, achievement results varied from school to school. "Students attending private schools established before the introduction of vouchers were largely responsible for the achievement advantage of voucher students"; those attending the newly established Hope academies (contrary to Paul Peterson and associates' findings) "actually scored lower than their counterparts in the Cleveland Public Schools" (Drury 2000).

A more recent study by Metcalf found a slight edge for Cleveland voucher students after three years of school (Johnston, September 12, 2001, Ohio Department of Education

2001). The study "examined performance of a randomly selected group of 894 scholarship recipients and public school students" who began kindergarten in 1998. Metcalf found that scholarship students were performing at higher levels in math, reading, and language by first grade. By the spring of their second-grade year, "public-school students had closed the performance gap in all areas" (ODE website). However, scholarship students who remained in the program for three full years "continue to perform slightly higher."

**Other Studies.** Analyzing several evaluations of the Cleveland and Milwaukee programs and a privately funded New York City scholarship program, WestEd researchers found consistent, generally positive results regarding inclusion of low-income families, parent satisfaction, parent education levels, parent marital status, family size, race-ethnicity, and attrition and mobility (Adelsheimer 1999). Researchers' findings were inconsistent regarding student achievement and parent involvement.

On October 1, 2001, the U.S. General Accounting Office issued a report stating that "research doesn't provide a definitive answer on whether publicly financed tuition voucher programs in Cleveland and Milwaukee have raised student achievement" (Zehr 2001). The GAO reviewed research conducted by state-contracted evaluation teams and independent researchers, focusing on standardized test results and excluding issues of student and parental satisfaction.

Findings were inconclusive, according to the GAO, because "researchers found different results when they used different methods to compensate for weaknesses in the data" (Zehr 2001). Inadequate enrollment and test-score information for the Milwaukee program added up to too many unknowns.

## **Implementation Challenges**

**Operational Obstacles in Ohio.** One major challenge to publicly funded voucher programs involves transportation—the Cleveland program's biggest headache, besides bureaucratic opposition, according to program director Bert Holt (Archer, June 9, 1999). Because of insufficient funding, voucher students had to be transported by cab drivers (who overcharged for their services) to private schools. This oversight resulted in the legislature's approval of an additional \$2.9 million in state aid for the voucher program and a prompt amendment of the voucher law to include school-bus transportation.

Monitoring has also been problematic in Cleveland's charter and voucher programs. In January 2000, a state audit "charged that the now-defunct Islamic Academy School of Arts and Sciences had taken \$70,000 from the Cleveland voucher program for students who did not attend the school" (Archer, January 19, 2000). There are administrative problems surrounding approval of vouchers for higher income families. More oversight is being planned for all Ohio choice programs.

Another challenge is reconciling the Cleveland program's intent and purposes (supposedly to give low-income parents an alternative to poorly performing public

schools) with current implementation practices. A study found that just one-fifth of voucher pupils left public schools in Cleveland, and that one-third of students using vouchers for private-school tuition "had already been enrolled in a private school before receiving the publicly funded benefits" (Fine 2001).

According to a senior researcher at Policy Matters Ohio, the nonprofit group that conducted the study, "the numbers suggest that vouchers in Cleveland are serving more as a subsidy for students already attending private schools than as a way for students to leave badly performing schools" (Fine 2001). Despite critics' claims that the study raises new constitutionality concerns, state officials do not "believe the program is disproportionately benefiting private school students."

**Management Mobilizations in Milwaukee.** John Witte (1999), commissioned to conduct a five-year evaluation of the Milwaukee Parental Choice Program, gave the program high marks for its original design, which succeeded in attracting very poor, mostly minority families whose children were not performing well in the public schools. Parents were satisfied with their children's new private (nonparochial) schools, and the private schools benefited by becoming more solvent and, in some cases, converting to public charter schools.

For Witte, the program had four somewhat negative aspects: loss of better-educated, active parents for public schools; a 30 percent student attrition rate from the private schools; closure of four private schools; and unremarkable test scores. Witte found little empirical support for the legislature's expansion of the program in 1995 to include religious schools and serve 15,000 students (including some K-3 students already attending private schools). Witte believes the legislature may be tempted to expand the program further to embrace non-Milwaukee and higher income families.

### **Effect of Public Vouchers on Private Schools**

Voucher plans' effects on private schools cannot be ignored. Currently, the United States provides private schools with very limited kinds of assistance—state aid for busing, books, and auxiliary services, and special federal programs for disabled and disadvantaged students—and regulates them lightly, compared with many other countries (Center on Education Policy 1999).

Acceptance of public funds is usually accompanied by government regulation and increased paperwork (Adelsheimer). States or the federal government would have to hold private schools accountable for their use of public funds; ensure equitable, nondiscriminatory educational and administrative practices; protect parents from profiteers; and ensure that students receive an adequate education (Center on Education Policy 1999). Currently, neither Florida private schools nor the Catholic Archdiocese of Milwaukee have to report voucher students' test scores—a practice that is likely to change in an accountability-prone era (Bracey 2000).

Private schools do not have to administer the same standardized tests as public schools or hire college-educated teachers. They are not subject to open-meeting or open-records laws, nor must they provide the public with data on suspension, expulsion, or dropout rates; teacher certification, salaries, or benefits; or the education of bilingual and special-education students" (Miner 2000, Kennedy 2001).

The vast majority of private schools are sectarian. As of fall 1997, there were 27,402 private elementary and secondary schools in the United States, of which 48 percent are Catholic, 30 percent are other religious, and only 22 percent are nonsectarian (U.S. Department of Education 1997). As one public-policy professor points out (Kennedy 2001), "any voucher program purporting to give students and their parents significant 'choice' must invariably include pervasively sectarian institutions"—a significant constitutional roadblock for voucher proponents, who view vouchers as an updated K-12 version of the GI Bill.

Myron Lieberman (2001) points out that denominational schools predominate in voucher plans because "free" public schools' enjoy an unfair competitive advantage over nondenominational schools that parents would have to pay for. Parochial schools are not true competitors, however, as they offer a type of education unavailable at public institutions.

Implementation of voucher programs (as in Milwaukee) may be hampered by some private schools' midyear school closings, student attrition, unstable finances (Witte 1999). A common eligibility requirement for voucher recipients is participation in government free/reduced-price lunch programs—a problem for private schools that do not participate (Mandell 1999).

Milwaukee parochial schools are coping with increased growth and more intrusive accountability and admission standards. Some applicants may be overlooked in favor of kids backed by \$4,900 vouchers (Fuller and others 1999). In some areas, voucher amounts are too small to cover the costs of private-school tuition. Florida private schools with relatively high tuition, for example, may not wish to accommodate kids with \$4,500 vouchers (Elam 1999).

More information is needed concerning private schools' capacity and willingness to accept diverse student populations. A U.S. Department of Education study that surveyed private schools to discern their willingness to relieve overcrowding in urban public schools uncovered statistics with implications for voucher programs (Muraskin 1998). Fully 73 percent of nonpublic schools are not interested in accepting special-needs students; 92 percent would accept student transfers only if "allowed to maintain their current admissions, curriculum, and religious-instruction policies."

### **Effect of Vouchers on Public Schools**

Proponents of vouchers (and of school choice in general) claim that competition with private schools will spur public schools to perform at a higher level in an effort to satisfy

parents and students and keep them from fleeing to private schools. Opponents counter that, in the competition for students, private schools will siphon from public schools their best students (and the per-pupil funding that accompanies them), leaving those schools in worse condition than before this free-market "reform" was enacted.

Caroline Minter Hoxby (2001), a professor of economics at Harvard University, notes that "only in one city, Milwaukee, and in two states, Arizona and Michigan, have the new choice reforms created truly fluid education marketplaces for a sustained period." Her data from those three locales show that public schools respond favorably to competition. "In Milwaukee," she states, "schools facing more competition from vouchers improved at rates faster than schools facing little or no competition from vouchers." The positive effect of competition was evident in every subject area tested. Fourth-grade math scores, for example, rose by about 7 percentile points per year in the schools facing most competition, compared with just 4 percentile points in the schools in the control group.

John Q. Norquist (2002), the mayor of Milwaukee, testifies that his city's voucher and charter-school programs have "brought higher achievement, fostered diversity and contributed to urban renewal." Pointing to improvements throughout the Milwaukee education systems that have come about since the city embarked on school choice, Norquist, a Democrat, rejects the claim that vouchers help private schools at the expense of public schools:

The important thing to understand is that the choice and charter school programs have brought many fundamental changes in the way Milwaukee public schools do business. Responding to expanded school choice, public school administrators negotiated with their teachers' union a new program to "counsel out" problem teachers. They gave individual schools more responsibility for teacher hiring, school budgeting, and curriculum. And they expanded specialty programs like Montessori schools that historically turned students away because of space shortage.

Those changes worked magic internally. There were structural changes that helped the schools get more in touch with the community as well. Public school administrators approved a neighborhood school initiative to increase the number of schools that students can walk to; they converted halftime kindergarten to fulltime; they embarked on a major expansion of before- and after-school child care. And they launched a citywide effort to publicize successes and new programs to prospective and current parents. (Norquist 2002)

Two econometric studies that examined competition and feasibility issues cast an unfavorable light on voucher plans.

The first, examining whether vouchers increase educational quality in public and private schools, found vouchers' effects to be ambiguous, even when controlling for "budget-maximizing administrators" (Rangazas 1997). Across models and alternative plans,

"vouchers will remove those households with the greatest willingness and ability to pay for education, leaving households behind who are less responsive to changes in public-school quality. This means public-education providers are likely to become less, not more, efficient."

The second study, which probed costs of educational voucher systems, made "ballpark" estimates in five cost areas: accommodating additional students, recordkeeping, student transportation, information to parents, and dispute adjudication (Levin and Driver 1997). These estimates suggest that "the public costs of a voucher plan in a representative U.S. context could raise public educational costs by 25 percent or more" (Rangazas 1997).

### **Voucher Programs' Cost-Effectiveness**

Proponents claim that voucher plans use "education dollars more efficiently than public schools," because of many private/parochial schools' lower per-unit costs and because "private schools can choose not to admit children with disabilities and special learning needs" (Fuller and others 1999). Since private sectarian schools are heavily subsidized, vouchers only cover part of tuition and other costs (Southwest Educational Development Laboratory 2000).

According to Policy Analysis for California Education (PACE) researchers, the Cleveland program refutes such cost-effectiveness claims. Although the voucher unit cost is \$1,763, additional costs for transportation, administration, and two ancillary state-aid programs bring the total to \$3,192—comparable to the cost of regular public-school education. A study by Jay Greene and others (1997) brings estimated per-pupil costs to \$6,507. This figure "includes average K-12 expenditures after costs have been factored in for expensive categorical programs, like special education or compensatory reading programs—efforts which don't operate in voucher-supported private schools" (Fuller and others).

Barbara Miner (2000), editor of the Milwaukee-based journal *Rethinking Schools*, claims that the Milwaukee voucher program is draining money and support from public schools. The \$39 million program "is not funded separately but comes directly out of state dollars that would otherwise go to public schools." Meanwhile, the state has also imposed spending limits on public schools, leading to a \$31 million deficit in 1999-2000. Under Current Wisconsin law, "school districts may raise local property taxes to help pay for the voucher program, but cannot raise taxes similarly to meet the needs of public schools" (Miner 2000).

Economist Henry Levin (1998) suggests that the cost of a public voucher system may actually exceed the cost of the present system. According to his analysis of Milwaukee's program, private schools with voucher students received for the 1996-97 school year about \$1,000 more per student than did comparable public schools. Levin calculated that the cost of a national voucher program open to all students and providing all public-school services would cost taxpayers about \$33 billion yearly. The "costs of accommodating additional students in private schools, record-keeping and monitoring,

and providing transportation would... bring the total to \$73 billion, about 25 percent of the current cost of public education nationally" (Levin 1998).

In addition to assuming increased regulatory duties for a voucher program, the state would also have to open parent-information centers, establish an adjudication system to mediate interschool disputes, and set up a student-eligibility monitoring and assessment system. School certification systems would likely expand, along with pressures to fund student transportation, as Levin suggests (Fuller and others 1999).

## **Policy Issues and Recommendations**

Objective research studies on public vouchers are still needed. As WestEd researchers have observed, "virtually no studies conducted to date are credible to both sides of the issue" (Adelsheimer 1999). Collaborative, large-scale, multiyear studies that use methodologies approved by advocates and opponents would be invaluable. The National Research Council plans to conduct a ten-year, large-scale examination of voucher programs (White 1999). Paul Peterson (1999), who has evaluated private voucher programs in several cities, believes these pilot projects can contribute a great deal to scholarship and ongoing discussions about school choice, regardless of sector.

WestEd researchers offer other recommendations, such as the importance of educating the public about alternative school-choice options, considering the true costs of administering voucher programs (including compensating public schools for loss of students), and designing programs to further educational and future employment opportunities (Adelsheimer 1999). Planners must address voucher amount and availability, selection of recipients, dissemination of information, engagement of nonchoosers, racial/ethnic balance, provisions for special-needs students, and transportation.

## **Arguments for Progressive Voucher Policies**

Matthew Miller (1999) recommends that teacher unions embrace choice innovations as a catalyst for improving public education and that conservative voucher advocates relinquish their money-saving motivations. Claiming support from Milton Friedman, the NAACP, Lamar Alexander, and assorted liberals, Miller advocates furnishing poor, innercity kids and failing local public schools with vouchers based on basic per-pupil costs plus 20 percent. This progressive approach, Miller believes, will "pursue the benefits of vouchers without risk to the poor." However, Miller's "grand bargain" idea made little headway at a March 2000 conference for advocates and opponents sponsored by the Annenberg Policy Center at the University of Pennsylvania.

Two other experts have also advanced a liberal case for vouchers. Harvard University professor and researcher Paul Peterson (1999) believes that "vouchers have the potential to improve socioeconomic and racial integration, as long as they are generous enough to cover most of the tuition and... schools are prohibited from racial or ethnic discrimination in admissions." As Peterson point out, public schools are already "plagued



by vast inequalities," despite decades of finance reforms and three decades of busing programs.

Robert Reich (2000), former U.S. Secretary of Labor, takes Peterson's argument further in a *Wall Street Journal* commentary. Like Peterson, he acknowledges the polarization between good and bad schools, due to residential/income segregation and inequitable tax base problems. Reich is convinced that the only way to "decouple poor kids from lousy schools is to give [them] additional resources, along with vouchers" and enable them and their parents to use them appropriately. Like Miller, he advocates a progressive, well-funded voucher system that will benefit recipients *and also* improve public schools, instead of draining their resources.

Under Reich's plan, "a child from America's poorest 20 percent of families" would receive a \$10,000 to \$12,000 voucher; children from the next quintile would receive vouchers worth \$8,000 to \$10,000. According to Reich, both urban and suburban schools would actually *compete* for the hardest-to-teach students and would have enough funds to hire better-qualified teachers, start after-school programs, and buy new textbooks. Since implementing a progressive voucher system would probably mean pooling local property taxes from poor and affluent communities, he advises proponents and public-school reformers not to hold their breath.

### **Some Criteria for Measuring Voucher Proposals**

The National Center for the Study of Privatization at Columbia University Teacher's College, headed by Harry Levin, has established four criteria for judging voucher plans' quality and integrity: the degree to which they offer (1) freedom of choice, (2) productive efficiency, (3) equity, and (4) social cohesion (Goldberg 2001). (The center seeks to be objective in its research methods; its studies of educational outcomes usually offend privatization advocates and opponents alike.)

In a recent interview (Goldberg 2001), Levin says his *primary* concern is not determining the relative merits of private versus public schooling, but improving the welfare of disadvantaged students in New York and elsewhere. He believes no current research project or reform policy can work fast enough to rescue a constantly shifting population of low-achieving students trapped in unresponsive, financially distressed, innercity schools.

### **Private Voucher and Scholarship Plans**

In addition to government-funded voucher plans, which have been constrained by political and legal challenges, a number of privately financed voucher plans have emerged around the country. Beneficiaries include several thousand children from low-income families who receive grants covering about half the cost of private-school tuition. Funded by businesses, private foundations, and individual donors, these programs "are focusing public attention on the merits of Catholic, Baptist, Lutheran, Muslim, Jewish,

and other religious schools" that are successfully and efficiently educating poor students in the same neighborhoods as their failing public schools (Meyerson 1999).

Through the 1998-99 school year, spending on privately funded voucher programs had totaled \$61 million. As of 1999, these programs were allowing 13,000 children in 39 cities to attend private/parochial schools of their choice (Meyerson 1999).

### **Pioneer Programs: Founders and Philanthropic Philosophies**

The earliest privately financed voucher plan was the Golden Rule Program in Indianapolis, established in 1991 by the Educational Choice Charitable Trust and inspired by insurance CEO J. Patrick Rooney (Fuller and others 1999). Rooney set the tone for the private-scholarship movement by limiting participation to less affluent families and covering only partial tuition—a "hand up" strategy designed to motivate parents to adopt "take-charge" attitudes and regard education as an investment (Meyerson 1999). Also, schools are free to exclude students not suited for their particular educational approach. By early 1999, the Golden Rule Program had spent \$5.7 million on K-8 vouchers. It now offers lottery-awarded, half-tuition scholarships to over 1,700 Indianapolis children, with 4,200 on a waiting list (Meyerson 1999).

Rooney's program caught the eye of James Leninger, a medical-supply company CEO, and Fritz Steiger, president of the Texas Public Policy Foundation. In 1992, they initiated the Children's Opportunity Foundation, which offered scholarships to low-income San Antonio kids. Aided by the Walton Family Foundation, Leninger and Steiger spread Rooney's idea to other cities and established CEO America, based in Benton, Arkansas, "to provide matching grants and support services to new voucher programs" in many cities, from Los Angeles to Chattanooga, Tennessee (Meyerson 1999).

Michael Joyce, president of the Lynde and Harry Bradley Foundation, achieved the greatest public-policy success of all voucher philanthropists by founding PAVE (Partners Advancing Values in Education)—a scholarship program that led to Milwaukee's publicly funded voucher program serving 10,000 children (Meyerson 1999) (see Public Voucher Plans section). In contrast to the Wisconsin legislature's modest parental-choice program that featured only private nonsectarian schools, the PAVE initiative embraced religious schools and poorer children already attending private schools at their parents' expense. PAVE's popularity with parents spurred the state legislature to include these provisions in its 1995 program expansion (see Public Vouchers Section).

### **Scholarship Program Milestones**

The "ABC-Giffen Scholarship Program is the first privately funded voucher program to provide scholarship opportunities to all the students from one school" (Fuller and others 1999). In 1997, philanthropist Virginia Gilder and other ABC (A Better Choice) founders offered a private-school scholarship (worth up to 95 percent of tuition or \$2,000) to each of the 458 students attending Giffen Memorial Elementary School, which has... the lowest third-grade reading scores in Albany.

In 1997, "the New York City School Choice Scholarships Program began awarding 1,300 scholarships of up to \$1,400 to low-income students entering grades 1-5" (Fuller and others 1999). By spring 1997, 16,000 parents had signed up (Jacobson 1997). Jacobson, a magnet school parent and choice advocate, observes that this eleven-to-one ratio is "greater than the odds of getting into Stanford."

In fall 1998, San Francisco Independent Scholars (SFIS) began offering \$2,000 merit scholarships to 100 eighth-graders, based on grades, test scores, teacher recommendations, and essays (but not income) (Fuller and others 1999).

Horizon Scholarships of San Antonio, Texas, was the first privately funded voucher program to offer scholarships to all low-income students in one school district—the predominantly Hispanic Edgewood School District (Fuller and others 1999). In 1998, Leininger and CEO America committed more than \$50 million over 10 years to give every Edgewood child "access to any religious, secular private, or public school in the San Antonio area" (Meyerson 1999). Students are admitted on their own merit, and the program has been extensively studied by Paul Peterson of Harvard University (See below).

### **The Children's Scholarship Fund: Charity, Capacity, and Motivations**

The brainchild of venture capitalist Theodore Forstmann and Wal-Mart heir John T. Walton, the Children's Scholarship Fund has become the nation's largest private scholarship program (Fuller and others 1999). In June 1998, these magnates "pledged \$100 million in challenge grants for voucher programs and announced they would be recruiting local partners to match their contributions" (Meyerson 1999). The Children's Scholarship Fund received enough matching contributions to finance 40,000 four-year scholarships for the 1999-2000 school year in New Orleans, Los Angeles, Kansas City, Philadelphia, Dallas, Chicago, Minneapolis/St. Paul, Miami, New York, and the states of Michigan and Arkansas (Fuller and others 1999; Meyerson 1999). Most of the lottery winners were expected to choose Catholic elementary schools, with average tuition of about \$1,500.

By April 1999, low-income parents of 1.25 million children had applied for these scholarships.

According to Terry Moe, Stanford University professor and voucher advocate, parents who sign up their children for scholarships are not necessarily dissatisfied with public schools but are expressing a "large, pent-up demand" for a kind of education they could not otherwise afford (Archer, April 28, 1999).

Despite disclaimers by Forstmann, who says he supports public education but wants to encourage competition, many leading educators (such as American Federation of Teachers President Sandra Feldman) detect public-policy motives and an anti-public-education slant to private-scholarship campaigns. CEO America, which has given

\$50,000 grants to help launch private scholarship plans in half a dozen cities, also lobbies strongly for public voucher plans (Archer, May 28, 1997).

As magnet-school parent Jacobson noted, large waiting lists for scholarships raise questions concerning the limits of private/parochial-school capacity (see Public Vouchers section) and of parental and charitable resources. In 1997-98, 200 scholarships in Milwaukee's PAVE program (see above) went unused by financially strapped parents who failed to raise matching funds (Archer, May 28, 1997).

Philanthropic organizations might be challenged to spend \$30 billion yearly to finance low-end private education for the 20 million children eligible for free or reduced-price lunches (Meyerson 1999). But 10 percent of these children could attend private schools at a cost of \$3 billion yearly—a not unreasonable sum "in a country with \$150 billion in annual charitable giving" (Meyerson 1999).

### **Program Evaluations: New York and Other Cities**

Paul Peterson's study of New York City's privately funded School Choice Scholarships Program (see above) found consistent, generally positive results regarding inclusion of low-income families, parent satisfaction and involvement, parental marital status and family size, race-ethnicity, and attrition and mobility (Adelsheimer 1999, Peterson and Myers 1998). Similar conclusions were drawn from later studies of private scholarship programs in Dayton, Ohio, and Washington, D.C. (Howell and Peterson 2000, Wolf and others 2000).

A booklet by People for the American Way claims there are many inadequacies in Peterson's work. Black children in New York City, for example, showed gains only in sixth grade, not lower grades as Peterson claimed and the averaged score implies.

In the New York study, Harvard researchers found that low-income voucher students "in grades four and five who attend private schools score higher in math and reading tests after one year than do students in the control group" (Peterson and others 1999). Also, parents report improvements in school climate, fewer disruptive events, greater home/family communication, and more stress on homework completion in private than in public schools.

The Harvard researchers' third-year study showed significant gains in educational achievement by black students who took advantage of New York City's privately financed scholarships to attend private schools (Mayer and others 2002). After three years in the program, the black students' composite test scores (combining math and reading) were 9.2 percentile points higher than the scores of their peers in public schools. "Impacts of a voucher do not vary significantly by grade level," the researchers say. No effect of the voucher program was found for Latino students, however.

The Harvard study of the CEO America-financed Edgewood Horizon Scholarship Program in San Antonio (see above) drew similar conclusions about low-income families'

participation, minority representation, and parental satisfaction with private schools (Peterson 1999). The study also documented modest achievement-test gains compared with public-school counterparts.

Although the Edgewood program did not "cream" students (90 percent of district students were poor enough to qualify for scholarships), parents who got vouchers are better educated and had higher aspirations for their children (Archer, September 29, 1999). Horizon reports that over 100 students who had been offered vouchers did not use their scholarships; many may be "in limbo" because no school would accept them (Archer, September 29, 1999).

An investigation by a University of Texas (Austin) graduate student revealed that the CEO-America program sponsors targeted selected students and that parents used vouchers primarily to support religious education for their children (Mandell 1999). Problems arose with private transport, additional costs for books and uniforms, mandatory participation in fund-raisers, and lack of federal lunch programs. Mandell also found that several Edgewood schools were high-achieving, and that both voucher and public-school parents interviewed seemed satisfied with local public schools.

Jay Greene's (2001) investigation of a Children's Scholarship Fund program in Charlotte, North Carolina, turned up positive results for students using a scholarship to attend private schools. Choice students scored 5.9 percentile points higher in the Iowa Test of Basic Skills math section and 6.5 percentile points higher in the reading section after one year than their public-school counterparts. Greene found smaller classes, minimal creaming and dumping, and high satisfaction levels among parents and students (mostly minority), despite the prevalence of "poorly funded, amenity-starved" facilities and lower teacher salaries.

### **Possible Benefits for African-American Students**

According to a comparison of test results for scholarship programs in three cities (New York City; Dayton, Ohio; and the District of Columbia), African-American students may have the most to gain from private scholarship programs (Howell and others 2000). Considering the three cases together, researchers found positive effects for school vouchers "only on the average test performance of students from African American backgrounds. Black students who switched from public to private schools in the three cities scored after two years, on average, approximately 6.3 percentile points higher on the Iowa Test of Basic Skills than comparable blacks who remained in public schools" (Howell and others 2000).

The research "also shows that the benefits are far greater in mathematics than in reading" (Archer, March 8, 2000). Black voucher students in grades 6-8 actually had slightly lower reading scores than did their public-school counterparts. Results also suggested it was "harder for middle-school students to adjust when transferring schools than for younger children" (Archer, March 8, 2000).

Researchers could not explain why voucher students from other ethnic groups did not experience similar benefits from transferring to private schools. It is also difficult to know whether achievement gains for black students would emerge in large-scale voucher experiments (Goldhaber 2001).

## **Tax Credits and Deductions**

Support is building for tax assistance for education costs, despite a long string of Congressional rejections of bills (since the late 1960s) that were designed to give families tax breaks on various private- or public-school expenses. The Bush Administration's budget plan for fiscal 2003 calls for a federal income-tax credit of up to \$2,500 for families wanting to transfer their children out of public schools identified as failing under criteria in the Elementary and Secondary Education Act. Taxpayers could use the credit to pay for half of the cost of tuition, fees, and transportation (for the first \$5,000 in such expenses) incurred in sending their children to private or different public schools (Robelen and Walsh 2002).

Taxpayer savings can come in two forms: a tax credit directly subtracted from the tax bill and a tax deduction—an indirect reduction of tax liability by lowering net taxable income (Fuller 2001). Both arrangements provide aid to private and church-related schools in a less direct way than do voucher plans (Elam 1999).

In 1998, the Phi Delta Kappan/Gallup Poll began asking respondents what they thought about proposals for state-legislated tax credits that would permit parents who send their children to private or religious schools to recover total or partial tuition expenses. In 1999, the public favored tax credits to cover all tuition expense (75 percent in favor to 41 percent opposed); approval soared to 65 percent for the "partial tuition" question.

Groups most enthusiastic about tax credits include public-school parents (79 percent) and public-school parents with "average" or underachieving kids (83 percent). Those who oppose tax credits are people 50 years or older and those with no children attending public schools. These same respondents, however, expect high accountability standards and liberal admission practices from private schools receiving public funds.

## **State Legislation**

Since 1997, Minnesota taxpayers have enjoyed "income tax-credits of up to \$2,000 per family to pay for computer equipment, tutorial services, and other educational costs" excluding private-school tuition (Johnston 1997). Although a 1971 Minnesota tax credit was overturned by courts in 1974, a 1955 tax-deduction law has withstood Supreme Court scrutiny and is still in effect. In the late nineties, the program was revamped to include increased deduction levels and an education tax credit (Fuller 2001; Johnston 1997).

Despite numerous challenges, Iowa has retained a 1987 tax credit/deduction of \$50 for offsetting tuition or textbook expenses (Fuller 2001). In 1997, the law was revised to

include a \$250 tax credit, removal of a \$45,000 income limit, and public-school extracurricular activity costs (Ziebarth 1999).

In 1997, the Arizona legislature enacted a \$500 tax credit for contributions to charitable organizations that provide private-school scholarships or grants to nondiscriminatory private and parochial schools, "as well as a \$200 credit for extra-curricular expenses" (Fuller and others 1999). In January 1999, the Arizona Supreme Court upheld the tax-credit bill, which had been challenged a year earlier by the Arizona Education Association (Fuller and others 1999). In October 1999, the U.S. Supreme Court declined to consider a subsequent AEA appeal of Arizona's tax-credit scheme (Walsh, October 13, 1999).

In September 2001, two Washington groups issued "dueling reports... on Arizona's 4-year-old tuition tax-credit program (Bowman 2001). The Cato Institute, free-market think-tank, praised the program for offering parents choices while saving taxpayer dollars; the People for the American Way criticize the program for not being based on need and being aimed primarily at kids already attending private schools. From 1998 to 2000, "Arizona's tax credit generated roughly \$32 million for more than 30 scholarship organizations" and subsidized 19,000 (private) scholarships (Bowman 2001).

In Florida, the House approved a measure that "would allow corporations to redirect up to 75 percent of their corporate income taxes to nonprofit organizations that award scholarships to low-income public-school students" (Sandham 2001). Students could get up to \$4,000 to cover tuition at private schools, including religiously affiliated ones. The Senate has proposed a similar measure. If approved by Governor Jeb Bush, either measure could extend a program now offering taxpayer-financed tuition to students attending "failing" schools for two out of four years. About 12,000 Tampa students are on a waiting list for scholarships from Children's Scholarship Fund—a program that could benefit from the proposed legislation (Sandham 2001).

## **Comparing Voucher and Tax-Credit Programs**

In a comparison of vouchers with tax-credit programs, Coulson (2001) favors tax credits as most equitable and effective at implementing market-driven freedoms and incentives. He claims that tax credits offer "greater resistance to new regulation," decrease "the risk of fraud and corruption," and avoid "problems arising from state funding of religious schools." According to Coulson, universal voucher programs "effectively guarantee funding to all needy families, but dramatically increase the risk of government intervention." Targeted programs would serve the poorest families, but provide financial disincentives for middle- and upper-income families to select private schools.

## **Tax Subsidies: Access, Equity, and Policy Issues**

Like voucher advocates, tax-subsidy proponents say that providing state aid to parents, not school bureaucracies, will mobilize competitive market forces and improve overall educational quality (Fuller and others 1999). However, instead of "targeting aid to low-

income families," tax credits "usually benefit parents with significant tax liabilities," and they require a sophisticated understanding of tax law. Tax deductions are even more problematic, since most families do not itemize deductions.

According to the report by Policy Analysis for California Education, it is difficult to predict how families will react to tax deductions or credits. A 1985 Darling-Hammond study found that "the deduction does not appear to be a powerful tool for equalizing school choice-making ability" (Fuller and others 1999). Data from Iowa and Minnesota (tax-subsidy states) show that private-school enrollment has actually declined slightly each year from the mideighties to the late nineties.

Tax subsidies will not necessarily increase public/private school competition, as claimed by proponents (Fuller and others 1999). Instead of "increasing their capacity to educate greater numbers of students," private schools might respond to such incentives by boosting tuition levels and educational quality (Fuller and others).

Frank Monahan (1999), an advocate of tax-credit legislation to benefit Catholic schools, suggests that such legislation must ensure a "broad class of beneficiaries as the best protection against a constitutional challenge in the courts." The tax credit or deduction "should be made available to all citizens who educate their children," in whatever institution, and not linked only to tuition costs. Such approaches have generally failed in state legislatures, because of anticipated high costs.

Tax credits have several benefits, according to Monahan. Granting tax relief to individual citizens will probably stave off heavy government regulation of private schools. Additionally, a strong argument can be made for "tax fairness and justice for nonpublic school parents who both support the local school system with their taxes and save states billions of dollars by relieving them of the responsibility for educating their own children" (Monahan 1999).

## **Homeschooling**

Homeschooling represents another option for parents—the choice to educate their children themselves, usually at home, rather than send them to public or private schools (Masters 1996). Some groups, including the Seventh Day Adventists and Mormons, have traditionally kept their younger children home, even after public schools became universally available (Lines 1995). The Amish have long trained their older children through community living rather than sending them to school.

Even today, the majority of parents who homeschool their children do so for religious reasons, basing instruction on "religious teachings, moral values, and patriotism mixed with basic skills" (Russo and Gordon 1996). A smaller group, identified as "pedagogues," use unstructured, child-centered curricular approaches modeled on reform advocates' philosophies or favor a more structured learning climate stressing "discipline, homework, individualized instruction, and patriotism."



A recent study of homeschooling rationales in a strong school-choice state (Minnesota) found that parents' reasons fell into five broad categories: educational philosophy, a child's special needs, school climate, family lifestyle/parenting philosophy, and religion and ethics (Lange and Liu 1999). Parents appeared to have multiple reasons for homeschooling that were independent of religious beliefs.

Mitchell Stevens, author of *Kingdom of Children* (2001), says "very different people are entering home schooling," compared with twenty years ago; most are worried about the quality of their children's schooling and feel they could do a better job at home. Interviews with seventy homeschooling parents around the country disclosed many individuals who were well educated, ecumenically minded, and frustrated by their children's treatment by public-school educators. They all shared a willingness to sacrifice (money, time, career advancement, and classroom space) for their children's education (Cloud and Morse 2001). Some parents felt they were forced to choose between taking care of their families and working to improve the schools—either "too far gone" or neglected by overly busy, two-income families.

## The Prevalence of Homeschooling

Tracking homeschoolers can be challenging, since many eventually return to public schools. In the late 1960s, there were probably 10,000 to 15,000 homeschooled children in the United States (Lines 2001). Whereas Lines (1995) estimated that roughly half a million school-aged children were learning outside school classrooms during the midnineties, the Home School Legal Defense Association put the figure somewhere between 700,000 and 1 million (Rieseberg 1995).

A spring 1999 household survey from the National Center for Education Statistics estimated that from 640,000 to 958,000 K-12 students were in full- or part-time homeschooling—about 2 percent of the school-age population (Bielick and others 2001). Karl Bunday's examination of reports from 18 states (Learn in Freedom website) suggests that homeschooling's annual growth rate may be slowing from 24 percent to 11 percent (Lines 2001).

According to Rieseberg, home-schooling families share some common characteristics. More than half have incomes of \$25,000 to \$55,000 and parents who have attended or graduated from college. Over 90 percent are Caucasian, and over 75 percent attend religious services. The mother teaches, and learning is flexible and individualized. Home instruction starts at age five and one-half and continues for at least four years. Children are schooled for three to four hours daily, not counting independent study time, and study many conventional subjects, particularly math, reading, and science.

Homeschooling parents generally have more children (Bielick and others 2001) and are more likely to vote regularly, contribute to political causes, correspond with elected officials, attend public meetings, and join volunteer organizations.

## Public Opinion about Homeschooling

In 1985, when the Phi Delta Kappa/Gallup Poll first asked whether the homeschooling movement was a good or bad thing for the nation, 73 percent of respondents disapproved and only 16 percent approved. By September 1997, the disapproval rating had fallen to 57 percent and approval had risen to 36 percent. The September 2001 poll (Rose and Gallup 2001) shows a 54 percent disapproval rating and a 41 percent approval rating.

In the 1999 Kappan poll, respondents were asked what public-school services should be made available to homeschoolers and what standards should be applied to measure their achievement (Rose and Gallup 1999). The public enthusiastically supported provision of special-education courses for disabled children (92 percent), opportunities for homeschooling teachers to participate in teacher-development activities (80 percent), and opportunities to participate in extracurricular activities (74 percent) and in driver's education (73 percent). A slight majority favored provision of transportation services (53 percent).

Changing public attitudes are gradually forcing school districts to drop their "administrative inconvenience" arguments against accommodations for homeschooling families and meet parents halfway (See Homeschooling Legalities and Homeschool/Public-School Partnership sections.)

Fully 92 percent of the Kappan respondents say homeschoolers should "take all the state and national assessment tests that public school students are required to take." This attitude contrasts sharply with that of politically savvy groups of homeschooling parent-lobbyists, who have worked to exempt homeschoolers from state exams in some states (Golden 2000).

In the September 2001 poll, two new questions were asked about homeschooling's effects on raising national standards and encouraging good citizenship. The public is sharply divided, with 43 percent believing homeschooling contributes to raising academic standards and 50 percent believing the opposite. Similarly, 46 percent think homeschooling aids good citizenship, and 49 percent believe it does not.

The attitudes of national education organizations seem out of step with growing public support for homeschooling and formation of homeschool/public-school partnerships. The National Parent-Teacher Association opposes homeschooling, the National Education Association is pushing for vigorous regulations, and the National Association of Elementary School Principals questions the educational effectiveness of less formal settings (Lines 1995).

## Homeschooling Legalities

By 1986, after countless court battles, all fifty states "had authorized some form of home education" (Dailey 1999). According to Lines (2001), "State law generally requires

homeschooling parents to file basic information with either the state or local education agency." Klicka's (1997) legal analysis indicates that states have also liberalized home teacher qualifications. Forty-one states "do not require home school parents to meet any specific requirements," and seven states require only a high school diploma or a GED. Parents do not need to be certified teachers (Lines 2001). Families are generally required to file basic information with either the state or local education agency.

The U.S. Supreme Court has not explicitly ruled on homeschooling, but has generally upheld parents' right to direct their children's education. Michigan, Kansas, and Texas have passed parental-rights acts to protect that right (Klicka 1997).

In twenty-six states, standardized testing or evaluation of homeschooled students is required (Klicka 1997). Ten states require standardized testing only; sixteen others provide an alternative to testing.

Lawsuits to secure homeschoolers' access to public-school services, including extracurricular activities, have been unsuccessful, as courts usually rule that voluntary or limited relationships with public schools are not a constitutionally protected right (Dailey 1999).

According to Dailey (1999), pursuing state legislation to create such a right (as in Idaho, Florida, Oregon, and Maine) is a more productive endeavor. Depending on the statute, homeschoolers can gain access via dual or part-time enrollment agreements, demonstrations of educational progress, or district approval. (See also the Homeschool/Public-School Partnership section). Increasingly, school leaders' claims of administrative difficulties in serving homeschoolers no longer seem persuasive when juxtaposed against opportunities to enrich a child's education (Dailey 1999).

## **Homeschoolers' Academic Performance and Social Development**

People disagree over homeschooling's social and academic benefits. Test score data from states requiring testing or from homeschooling associations, while not totally representative, suggest that tested homeschooled children are above average (Lines 2001). According to two *Time* reporters (Cloud and Morse 2001), "the average SAT score for home schoolers in 2000 was 1100, compared with 1019 for the general population."

Ray's report shows that "home-schooled pupils who took the Iowa Test of Basic Skills outscored public school students by 37 percentile points" (Viadero, March 19, 1997). On the Stanford Achievement Test, the advantage was 30 percentile points. The longer kids had been educated at home, the better their test scores. Also, "students whose parents had teaching certificates scored only slightly higher than the children of nonteachers" (Viadero, March 19, 1997).

Results were similar in Lawrence Rudner's (1999) large-scale, noncontrolled study of 20,760 K-12 homeschoolers from 11,900 families who subscribe to Bob Jones University's Testing and Evaluation Service. Students' median scores on the Iowa Tests of Basic Skills or Tests of Achievement Proficiency (TAP) fell between the 70th and 80th percentiles. While urging caution in interpreting results (especially in light of participating families' white, middle-class demographics), Rudner concludes that a homeschool setting has proved academically beneficial for these kids. This observation holds true even though "not all home schoolers take standardized tests" and not all homeschools have well-structured curricula and dedicated parents (Cloud and Morse 2001).

Homeschooled children do not necessarily live socially isolated lives. "They may spend less time with same-aged children and more time with people of different ages" in volunteer, tutoring, and other activities (Lines 1995). According to Ray's study, they "regularly participate in an average of 5 activities outside their homes, ranging from Sunday school to sports teams." Visiting like-minded families and using available community resources, such as libraries, museums, colleges, extension courses, local businesses, mentors, and private schools, enriches children's social and intellectual development.

## **Homeschool/Public-School Partnerships**

As state legislators, school boards, and the public become more receptive, homeschoolers are gaining access to even more resources, including public schools. The National Center for Education Statistics estimates that "18 percent of children who are home-schooled enroll in school part-time; 5 percent enroll for 9 or more hours a week" (Bielick and others 2001). According to Lines (1996), "most state education agencies have a home-schooling liaison," and a growing number of school districts are offering homeschoolers access to extracurricular activities and classes on a part-time basis.

Some educators object to such access on the basis of fairness and even logistics (Hardy, August 2001). For example, opening advanced-placement and honors courses to homeschoolers could be a problem, if there are waiting lists of high-school students who have taken prerequisites and if teachers can't readily gauge homeschoolers' readiness for upperlevel classes. Closed campuses present another barrier that needs to be worked out. Regarding participation in extracurricular activities (particularly athletics), it is sometimes difficult to waive attendance and academic requirements pertaining to regularly enrolled students (Lett 1999).

Homeschool/public-school partnerships, such as an arrangement that Alaska educators pioneered, are an interesting development. In this plan, teachers in Juneau work with students in Anchorage and remote areas, communicating by phone, mail, and occasional visits. District-level partnerships have emerged in other states. In California, children may enroll in an independent-study program allowing completion of studies at home. Illinois, Iowa, Washington, Maine, and Virginia allow students to enroll part-time, if families request it (Lines 1996, Linda Jacobson 1997).

Since 1984, the Des Moines (Iowa) Public Schools have been offering a "cooperative home-based experience for parents who choose to teach their children at home" (Dahm 1996). Their Home Instruction Program serves over 310 students from 165 families—1 percent of the district's enrollment. Families have wide-ranging choices as to curricular road maps, assistance from eight full-time teachers, evaluation methods, and dual-enrollment options.

Partnerships can benefit schools by helping them open up communication lines; fulfill their educative responsibilities; gain opportunities to study effects of lay tutoring, child-led learning, and distance learning; and increase their enrollments and possible funding allocations (Pawlas 1997). Partnerships may prove vital to public schools' institutional survival, as new technologies make homeschooling and other "de-gathered" educational approaches more convenient and cost-effective (Martorella 1996).

## **The College Connection**

Of 14.5 million U.S. undergraduates enrolled in higher education institutions in 1998, more than 200,000 are former homeschoolers—a number the National Center for Home Education estimates will grow to 1 million by 2010 (Blair, March 29, 2000b).

A survey of 513 public and private higher education institutions found that only two lacked "policies to critique homeschooled applicants during the 1998-99 school year" and that 68 percent of these policies favored homeschoolers (Blair, March 29, 2000a). Many formerly skeptical colleges and universities have even developed special admissions policies and simplified assessment processes to accommodate such applicants.

According to Christopher Klicka, many colleges used to require homeschoolers to "take a barrage of standardized tests and earn the General Educational Development credential... before applying for admission." Others required superlative SAT or ACT scores (Blair, March 29, 2000a). It is now more common (and far less discriminatory) to consider portfolios, parental transcripts, and "normal" SAT and ACT scores as legitimate assessment methods (also recommended by the National Center for Home Education).

Rebecca Talluto (2001), dean of educational services at Brevard Community College (Titusville, Florida), questions the prevailing double standard for high-school students and homeschoolers seeking dual-enrollment status at local colleges. In lieu of transcripts or a guidance counselor to verify their grade level, homeschoolers "must submit a notarized affidavit that says they are at least sophomores," and their parents must "sign a form... stating that the student meets at least minimum GPA requirements." The problem is that most parents assign their kids a GPA of 4.0, even if they say they do not keep such records.

In a similar vein, Talluto (2001) observes, regular students must meet the state's graduation requirements to attend a community college, whereas "home-schooled students need only submit a notarized affidavit stating they have fulfilled those requirements." Although Florida, Virginia, Ohio, Tennessee, Connecticut, Illinois, and

Massachusetts have some fairly strict guidelines regarding homeschool programs, Talluto (2001) questions these regulations' effectiveness in light of her own experience. She wonders how closely superintendents or school districts are monitoring homeschoolers' progress and how many kids are "taking standardized tests at their own kitchen table." Some reevaluations of home-education controls may be in order.

In Virginia, a new college catering to homeschoolers wishing to "continue their educations within an evangelical Christian setting" was to open in fall 2001 (Blair, March 29, 2000b). According to founder Michael Farris, the mission of Patrick Henry College is to train leaders in lawmaking, business, and journalism within a Christian world view. Students will be required to obey honor codes and "corporate-casual" dress codes, get parents' permission to date, and work to earn half the needed credits for the academic majors. Neither the college nor students will be allowed to accept federal aid to defray the \$15,000 yearly tuition.

## Virtual Schools

A rapidly growing form of distance education, virtual schools, also known as cyber schools, offer parents and students a wide spectrum of online curricula. Parents, particularly full-time workers, are increasingly relying on online curricula to supplement or even supplant homeschool offerings (Zehr 2000).

*The Wall Street Journal* reports that virtual schools enroll fewer than 50,000 students nationwide, a small fraction of the 53 million students in U.S. K-12 education systems (Tomsho 2002). "But that is changing," says the journal, "as companies pitch online education as a way for school districts to stretch resources and maybe even make money" (Tomsho 2002). Although for-profit companies play an important role in the development of virtual schools, many of the most successful such schools are operated by states, school districts, and individual public schools.

A survey of virtual schools by WestEd's Distance Learning Resource Network (Tom Clark 2001) confirms that the "movement can be considered the 'next wave' in technology based K-12 education, joining proven distance learning delivery methods." The survey of forty-four virtual schools points to a trend toward offering all grade levels, whereas the first virtual schools were mostly high schools. Extrapolating from the survey, WestEd estimates that "40,000 to 50,000 K-12 students will enroll in an online course in 2001-2002" (Clark).

Virtual schools are sanctioned to operate in fourteen states as the states' "own" K-12 virtual schools, according to WestEd. Among other types of virtual schools, some are based at universities, several are run by consortia (a few of these draw students from across the nation), many serve particular school districts, some operate as charter schools, and some are offered by private organizations. Forty-three percent of the surveyed schools began in 2000 or 2001 (Tom Clark 2001).

Some proponents attribute the growing popularity of online curricula to parents' concerns about school safety, following the Columbine shootings and other violent incidents. Others see online courses as a godsend for students with special learning needs or behavioral problems who do not perform well in classroom settings.

Virtual schools that receive public funding give homeschooling families a financial incentive to enroll. In states such as Pennsylvania, where virtual schools can be set up as charter schools and qualify to receive the funding that normally goes to the students' home school districts, virtual schools can afford to provide for each student free course materials and even a free computer.

## Examples of Virtual Schools

**Willoway CyberSchool.** For \$2,250 yearly, adolescent homeschoolers anywhere in North America can be taught by Willoway CyberSchool, an online private school founded by a former elementary-school teacher based in Rheinholt, Pennsylvania. A student "typically receives assignments over the Internet, researches them on World Wide Web sites, and then turns in a document in HTML, the Web coding language, to his teachers showing what he's learned" (Zehr 1999). Videoconferencing with teachers, hands-on experiments, and service projects outside the home help combat the loneliness factor.

**K 12 Inc.** Former U.S. Secretary of Education William Bennett recently launched K 12 Inc., his "classical" cyber-learning program for kindergarten through second grade (Trotter, October 17, 2001). So far, "the company has enrolled several thousand students, a majority of whom are homeschoolers in 46 states." A few hundred students are using the program at three chartered online schools in Colorado, Pennsylvania, Texas, California, and Alaska.

Homeschoolers enrolled directly in K 12 pay about "\$100 per half-year course, or \$1,000 for an entire school year's program, which they access on the company's web site" (Trotter, October 17, 2001). Resources consist of learning activities, daily assessments, planning tools, and instructional guidelines for parents, supplemented by shipments of books, tambourines, music CDs, and videotapes. Several national groups, including the American Federation of Teachers, are resisting the company's efforts to sign up massive numbers of public-school students, decrying K 12's reliance on parents rather than teachers to supervise learning (Trotter, October 17, 2001).

**VHS, Inc. (formerly known as the Concord Virtual High School).** More than 100 schools across the country participate in this virtual high school, which was developed with federal funding (a five-year Technology Innovation Challenge grant ended in October 2001) and is now funded by the membership fees of its cooperating schools (Tom Clark 2001). The leading model of a consortium, VHS, Inc. in 2000-2001 offered 155 courses—both core and elective—taught by teachers in its member schools. For a \$6,000 annual fee, a school can sponsor a NetCourse taught by one of the school's teachers and in return enroll twenty of its students in any of VHS, Inc.'s other courses in

both fall and spring semesters. Teachers learn how to teach online through a twenty-six week online NetCourse (Tom Clark 2001).

**Florida Virtual School**, the nation's largest virtual school, offers free courses to any student in grades 9-12 in the state. This state-funded school, which specializes in advanced coursework taught by certified teachers, serves students in public and private schools, charter schools, and those being schooled at home. Responding to superintendents' requests, Florida Virtual School has made a special effort to offer Advanced Placement courses. Enrollment rose from about 2,800 in 1999-2000 to 5,900 in 2000-2001, according to WestEd (Tom Clark 2001).

**The Internet Academy**, based in Federal Way, Washington, receives state aid to fill gaps in homeschooled students' instruction.

**The Kentucky Virtual High School** offers advanced, specialized, and foreign-language courses free to public-school students, but charges homeschoolers (and others) \$300 per course.

**The Colorado Online School Consortium**, operating out of Creed, was founded to provide advanced-placement courses to students attending rural and small schools and homeschoolers (Vail 2001).

## Growing Financial Controversy

Because of the large sums of money (in some states) that follow students who enroll in virtual schools, the movement is rapidly becoming a hot issue in school finance. *The Wall Street Journal* reports that some public school districts have launched virtual schools "specifically to attract students—and the public money that pays for their educations—from beyond their own boundaries." For example, "the tiny Vilas School District in rural Colorado boosted its revenue 75% this year, to \$1.4 million, thanks to a new online school that increased its student count to 170, up from 95 a year ago" (Tomsho 2002).

Several school districts in California "have used cyber schools to raid each other for students," states *The Wall Street Journal* (Tomsho 2002).

When set up as charter schools, virtual schools in Pennsylvania are entitled to the state aid that the students' home districts had been receiving. The financial ramifications of this state law are the source of a growing controversy among the state's school districts (Tomsho 2002).

Taking advantage of Pennsylvania's charter-school law, Morrisville Borough School District, northeast of Philadelphia, contracted with a startup virtual school, the Einstein Academy, which enrolls 2,000 K-12 students from around the state. The academy bills the students' home districts for the full amount of state aid (ranging from \$5,000 to \$14,000 per student), and in turn pays Morrisville \$200 for every student the school enrolls in the district. Having enrolled only 1,100 students within its geographic borders,



the district welcomed the revenue from the virtual school as a way to make up for a declining tax base. More than one hundred Pennsylvania school districts are suing Einstein Academy in an attempt to avoid paying the virtual school (Tomsho 2002).

## **A Few Caveats**

Although most observers of the distance-education trend in homeschooling agree that "one or two online courses can be a great benefit to home-schoolers, some decry a reliance on them for a full curriculum" (Zehr 1999). Michael Farris, president of the Home School Legal Defense Association, sees parent-child interactions as the essence of homeschooling and believes "online courses should be supplementary and used only in secondary grades" (Zehr 1999).

Tom Layton, the founder of CyberSchool, based in Eugene, Oregon, warns against administering a heavy dose of his own courses to homeschoolers. CyberSchool courses were originally developed and intended for students attending small, rural schools that can't afford advanced-placement courses. According to Layton, online learning exists as a supplement and "should never take the place of flesh-and blood teachers and peers"(Vail 2001).

A University of Virginia education professor deplores the use of virtual classrooms to support homeschooling (Russell 2001). Russell has three objections: Homeschoolers used to high levels of support from teachers/parents might lack adequate help and supervision; the "long-term cumulative effect of an education that forgoes traditional classroom-based socialization in favor of interactive Web sites is unknown"; and large-scale use of computers in virtual schools "might influence our culture in undesirable ways."

## **Public Opinion**

The September 2001 Phi Delta Kappan/Gallup Poll (Rose and Gallup) ascertained that the public disapproves, by 67 percent to 30 percent, of allowing students to earn high-school credits over the Internet without attending a regular school. Of the 30 percent who approve of virtual courses, only 49 percent would be willing to have their own child "go through high school taking mostly courses online over the Internet at home instead of attending a regular high school."

## **Alternative Schools**

Devoting a separate category to "alternative schools" is somewhat inexact, as every option discussed under School Choice represents an alternative to conventional or mainstream public education. Prospective founders of magnet and charter schools would surely profit by revisiting surviving alternative schools' early experiences (Dunn 2000), whether based on Waldorf, Montessori, Summerhill, or more pragmatic philosophies. To this list, Daniel Drake (2000) would add several "responsive" public-school varieties,

such as Comer Process schools, full-service schools, immersion programs, schools-within-schools, and middle schools.

Schooling alternatives have existed for centuries in many nations. By the end of the 1800s, public schools in the U.S. were flourishing. Many children attended church-sponsored schools; "some affluent families educated their children at expensive and exclusive boarding schools or at local private schools" (Koetke 1999).

Koetke (1999), a classroom teacher, notes the immense variety embedded in the term *alternative education*, which today can denote "programs for court-adjudicated youth, advanced placement students, special education or disabled students, or home-schooled children."

While absolute numbers of currently operating alternative schools remain elusive, state legislatures are increasingly funding alternative education programs for children who have difficulties adjusting to more traditional school settings. Between 1994 and 1997, for example, five states (Arizona, Illinois, Oklahoma, Oregon, and North Carolina) passed such legislation (Crampton 1998). Texas, Arkansas, and Wisconsin were pioneers in establishing alternative school settings for troubled high-schoolers.

## Purposes of Early Alternative Schools

During the 1960s, the first schools known as "alternatives" emerged in the private and, ultimately, the public sector in predominantly urban and suburban areas (Raywid 1999). According to Raywid (1999), urban programs tried to help struggling minority and poor youngsters succeed in school; early suburban initiatives "became innovative programs seeking to invent and pursue new ways to educate."

Open education "was part of a progressive alternative schools movement that began in the late 1960s,... peaked in the early 1970s," and was gradually overshadowed by the back-to-basics movement in the late 1970s (Dunn 2000). These schools frequently lacked inside walls and featured field trips and active, hands-on learning opportunities.

Alternatives springing up in the 1970s and 1980s included democratic schools stressing citizenship and student power, community schools focused on moral development, and "'experimental' programs such as Foxfire in rural Rabun Gap, Georgia" (Charlie Clark 2000). Many once-thriving open and "free-form" schools eventually closed. Others adopted more conventional curricula and practices (Dunn 2000, Charlie Clark 2000).

The list of surviving alternatives founded between 1969 and the early 1970s includes Cambridge's Pilot School; Philadelphia's Parkway School; Scarsdale Alternative School; Washington, D.C.'s School Without Walls; Arlington, Virginia's H-B Woodlawn (Charlie Clark 2000); Bloomington, Indiana's Harmony School (Goodman and Kuzmic 1997); and Charlotte, North Carolina's Irwin Open Elementary School (Dunn 2000).

Far from being passing fads, alternative-school philosophies and practices continue to flourish in private- and public-school settings. According to Raywid (1999), alternative-school formats are being adapted to many purposes: reducing juvenile crime and delinquency, preventing school vandalism and violence, deterring dropouts, desegregating classrooms, and enhancing school effectiveness.

## **Characteristics of Alternative Schools**

Although educational philosophies, purposes, and facilities vary widely, alternative schools share certain characteristics. They are usually smaller (under 200 students), or consist of smaller units within a larger school, and have a greater staff/student ratio than conventional schools (Koetke 1999). There is generally more opportunity for individualized instruction, use of unconventional approaches and organizational structures, and a "sense of community and personal caring" (Koetke 1999, DeBlois 2000).

Alternatives are typically student-centered, have a noncompetitive learning environment that measures improvement and shuns comparisons between students, and have instructional programs stressing a specific philosophy or school culture (Koetke 1999).

## **Types of Alternative Schools**

Raywid (1999) divides contemporary alternative schools into three types, based on their institutional mission: changing either the student, the school, or the entire educational system.

### **Changing the Student**

Schools in the first category, those designed as "last-chance" placements for unruly or adjudicated adolescents facing expulsion, come in at least two varieties. Schools may be either openly punitive or "highly structured," as in alternative education programs for disruptive youth funded by Texas' 1995 Safe Schools Act (Bickerstaff and others 1997), or therapeutic and remedial, as in Lexington, Kentucky's technology-infused Central Alternative High School serving 100 adjudicated youth (Koetke 1999). In most instances, placements are temporary and sometimes involuntary. Students who "shape up" are allowed to return to their "home" schools.

Lately, alternative placements for middle-school and even elementary students are being explored. An innovative program at Passaic (New Jersey) Public Schools has succeeded in cutting suspensions and reducing the number of disciplinary incidents at the district's middle school. The alternative school is located at nearby Felician College, where students are mentored by college students as part of a big brother/big sister project (Tomczyk 2000).

The St. Joseph (Missouri) Schools used a state grant to create an alternative Elementary Management School for aggressive youngsters that emphasizes behavior-management training aimed at improving students' social skills and returning them to regular classrooms (Henley and others 2000). Early results on the Burkes Behavior Rating Scale "indicate a general pattern of improvement, with 50 percent of the students showing improvement in all measured areas." Returning students have had fewer disciplinary referrals or suspensions and have improved academically.

A Florida study shows that improvement is rare in punitively oriented programs (Raywid 1999). In therapeutic programs, students' behavior and academic performance often regress when they return to more conventional school settings. Problems can emerge from segregating behaviorally challenging students from others and from inadequate funding of needed resources (see Problems and Prospects).

### **Changing the School Experience for Students**

In stark contrast to alternative programs that seek to change students are alternative environments that aim to change school and the way students experience school. These are "often highly innovative schools with novel curricular and instructional approaches and atypically positive school climates" (Raywid 1999).

The nation's most famous example is probably Central Park East Secondary School (CPESS), in East Harlem, New York (Raywid 1999). CPESS features a nontraditional "less-is-more" curriculum, inquiry-based instruction, exhibition/portfolio evaluation methods, and a "flat" governance system headed by a teacher director. The graduation rate is 90 percent; 97 percent of graduates go on to college (Raywid 1999).

Schools offering a "high-engagement academic curriculum" for able and/or alienated students desiring greater challenge also fit Raywid's second category. According to Professor Daniel Drake (2000), high-engagement schools are generally the most successful alternatives. They generally retain students until graduation and "adopt policies and practices that provide close working relationships among teachers and allow time for regular discussions of students' progress."

Career academies such as Fremont High School, in Oakland, California, and technology-oriented high schools, such as Tallahassee's Florida University School, are further examples of successful alternative-school offerings for adolescents. The idea behind career academies, which often follow a school-within-a-school format, is enabling students to visualize "more direct connections between education and their own futures" (Gehring 2000). Some experts believe constructing a system of meaningful credentials and applied-learning standards (as the basis of mastery certificates in academic foundations and industry-recognized skills) will more effectively prepare high-school students for both college and the workplace (Porter and others 2001).

However, academies and stand-alone technology schools differ from vocational schools in retaining an essentially academic curriculum that does not lead directly to jobs after

graduation. Although these schools would not suit everyone and have yet to improve student test scores, they offer a model for downsizing comprehensive high schools and for focusing educators and students on the same theme.

In a few communities, "classic underachievers" in search of something different have some interesting choices. One alternative is the Scotland School for Veterans' Children, in Scotland, Pennsylvania (Koetke). Founded in 1895 as a boarding school for the state's Civil War soldiers' orphans, this state-funded school now educates students (each sponsored by a U.S. military veteran) who haven't succeeded outside of a residential setting. The school houses its highest and best-behaved achievers in "honor suites" with Internet connections. Emphasis is on regular and technical college-prep materials, computer-assisted instruction, and hands-on projects.

A truly grassroots initiative may be found at the Center for Appropriate Transport (CAT), in Eugene Oregon, which hosts a dozen bike-related enterprises and a private alternative school serving mostly "bored and bummed-out" teenagers (Wind 2000). Interested youth aged 12 to 18 can be referred by the school district or sign up for a CAT course as an elective. Classes on various subjects, including welding and personalized bicycle repair, run two or three hours, and are taught by administrator and transportation-activist Jan VanderTuin.

The program is certified and publicly funded; VanderTuin's chief complaint is that district officials want to send him only problem kids. He claims an 80 percent success rate with these teens, but believes more kids in the district, including homeschoolers, should be made aware of CAT and other private alternatives in the area.

## **Changing the Educational System**

According to Raywid (1999), "early efforts at using alternatives as a means of introducing systemwide change" (in Minneapolis, Tacoma, and Berkeley) have generated numerous options and some positive signs of success. Seeing small schools and innovative alternatives as sharing the same characteristics, she says "the small schools and schools-within-schools movement occurring in the nation's cities today is actually a test of whether small alternatives can survive in large systems" and can adapt those systems to support such innovation.

**Harmony School's Contributions to Systemwide Improvement.** According to two University of Indiana education professors, "bringing a progressive pedagogy to conventional schools" is daunting, but not impossible (Goodman and Kuzmic 1997). During the early 1990s, Goodman and Kuzmic spent a year studying Harmony, a private, democratically oriented school in Bloomington, Indiana, committed, in part, to helping conventional schools reconceptualize their children's education. Harmony students are from widely diverse backgrounds, with over 85 percent receiving full or partial scholarships.

For these observers, the most serious challenge to incorporating alternatives is U.S. schools' ethos of individualism, which "supports a competitive, isolated learning environment and an organizational/curricular structure leading to social conformism." School subjects are usually taught as separate disciplines, classmates' ideas are considered irrelevant to one's own learning, and "students are painfully aware of their 'standing' in the class." Ironically, early alternative education in the United States also stressed personal liberty in an anti-authoritarian context; the need to promote each child's originality or thoughtfulness and to educate children "to develop compassion, altruism, cooperation, civic responsibility, and commitment to work for the general welfare of our planet" were neglected (Goodman and Kuzmic 1997).

More recently, Goodman and Kuzmic have identified many alternative schools that are trying to "balance the values of individuality and community." Harmony, for example, has moved from an individualistic orientation in the 1970s to a "connectionist pedagogy." This educational approach tries to "cultivate each child's unique individuality" while helping children understand how "life on this planet is deeply interconnected and interdependent." In 1990, Harmony School expanded its educational role by establishing an Office for Outreach Services and an Institute for Research.

Between 1990 and 1996, Harmony worked with almost 100 reform-minded schools across the nation to address necessary shifts in perspectives, understandings, and ideologies before alternative practices can be adopted. Public schools have profited from many of Harmony's "connectionist" ideas: social bonding (creation of a "society of intimates" via camping trips, picnics, secret friends, and other rituals); a socially conscious, teacher-created curriculum (free of state mandates and instructional packages); and a learning environment that balances freedom with responsibility. The most responsive public-school educators are those who "recognize the inherent value of transforming schools into learning communities" (Goodman and Kuzmic 1997).

**Waldorf Schools and the Rippling Effect.** The Waldorf schools, founded by German educator Rudolf Steiner in 1919, have contributed an idea that is making waves in K-3 education. Looping, the practice of "having general classroom teachers advance with their students year by year," is staging a comeback. Educators are realizing the advantages of extended teacher-student relationships and intellectual accountability for student learning, progress, and well-being (Uhrmacher 1997).

Uhrmacher (1997) points out some problems that emerge when using borrowed educational practices, such as looping, outside their original context. Some Waldorf educators are appalled at such borrowing, insisting "their ideas only make sense in a system that embraces their anthroposophical world view." Other Waldorf educators believe an idea like looping is transferable, if there is some motivating rationale or if teachers are willing to change the "ecology of schooling" (curriculum, pedagogy, school structure, evaluation, and intentions).

According to Uhrmacher (1997), Waldorf-style looping would require a less "stop-and-go" instructional ambience than regular classroom teachers and students are accustomed

to. Along with extended relationships go extended learning activities, such as "main lesson" books resembling highly decorative medieval texts created by students attempting to summarize what they have learned.

Uhrmacher (1997) notes that using these books effectively means changing the curriculum to include more visual images. The books' borders and drawings represent a way of knowing that must be incorporated into evaluation schemes. If non-Waldorf teachers do not change the curriculum to accommodate these books, children may view their pictures as only embellishments. A culture of efficiency or of curriculum segmentation would nullify Waldorf learning goals.

## Problems and Prospects

In an Appalachia Educational Laboratory policy brief, Soleil Gregg (1998) identifies three problems with creating separate alternative schools for students with behavior problems. Focusing on problem students may mask or overlook failings in the larger system. Also, programs targeting certain groups of individuals divert funds and other resources from everyone else. Finally, targeting difficult students may threaten equity by segregating poor, disabled, and minority students in alternative settings. Punitive rationales may actually undermine efforts to improve learning or behavior and compromise system equity (Gregg).

Susanna Ort, an observer of New York City's schools, lauds some schools' experimental practices; she also notes that too frequently, alternative-school students are stuck with old textbooks, boring workbooks, humdrum tasks, and limited expectations from teachers (Koetke 1999). Too often, alternative schools are viewed as "dumping grounds" or underfunded "warehouses" for difficult students, teachers, and even principals.

Tom Gregory (2001) supports these observations, noting that "alternative schools are often treated as second-class citizens by their districts" and can find themselves in "weak political positions" that encourage them to maintain a low profile and endure misunderstandings by colleagues and district administrators. For Gregory and others, turning alternatives into "soft jails" is not going to solve the problem of reaching unsuccessful, alienated youngsters.

On the plus side, an essay by Robert DeBlois (2000) argues passionately for establishing well-funded alternative schools of all varieties to counteract the alienation, impersonality, and social conformity characterizing most large, comprehensive high schools. Many towns and cities "have numerous choices for worship, entertainment, and shopping, but only one choice for the public education of adolescents." Astounded by Columbine High School's "sheer size" in aerial views after the shootings, DeBlois (an alternative-school director) echoes researchers' findings that small schools "are places where students get more attention, perform better, and are happier." Kids of all talents and personalities have greater opportunities to fit in.

Economies of scale, DeBlois (2000) notes, are failing to pay expected dividends. Educators' attempts to remedy flaws in the system by creating smaller groupings within large schools come with a high price tag. Many students targeted by such innovations may remain unserved because they are not joiners. Other "hidden" costs of large schools include extra funding for students requiring a fifth year to graduate and social-service programs to serve dropouts who cannot find employment.

Serving alienated kids or those needing something different should not be considered an optional responsibility of schools (DeBlois 2000). According to one expert, "what a youngster who doesn't thrive in one school environment needs is another environment" (Raywid 2001). According to Raywid (2001), standardized schooling has severe limitations, and establishing only one "straightening-out center" (whether termed an "alternative," "opportunity," or "second-chance" school) is useless. The research-verified formula for a good education—"small, personalized schools offering authentic learning and producing student engagement—is essential if we are serious about enabling unsuccessful youngster to become successful" (Raywid 2001).

Incentives could take the form of state or federal startup grants; charter-school legislation could fuel establishment of small alternative schools (DeBlois 2000). Career academies can often garner business support, and innovative private alternatives, such as the Center for Appropriate Transport program described above, may qualify for district funding. DeBlois believes alternative schools would prove invaluable in violence-reduction efforts, since "a child would find it hard to go through even a portion of the day without some meaningful contact with an adult."

## **Alternative Pathways to Success: Some Recommendations**

Arguing that alternative schools could play a pivotal role in revitalizing (and downsizing) the American High School, Tom Gregory (2001) targets common practices in public alternative schools that reinforce their "second-class citizenship" (see above) and retard progress toward that goal.

Regarding people issues, many alternative educators need to gain more control over who attends, recruit a more diversified student body (not only those with behavior problems), control students' time of entry, and recruit appropriate teachers (not those banished from regular schools). Since "the business of alternative schools is to create powerful, engaging programs that stretch students in ways they never envisioned," alternatives need to define themselves accordingly and develop unique programs, instead of operating as "another track of their big sister schools' programs."

According to Gregory, today's big high schools are dinosaurs that are successful only with an elite group of students; everyone else requires a different delivery system resembling that embodied in "our best alternative schools."



There are equity and parity issues that must be addressed, such as rundown facilities and insufficient resources. After tracking alternatives in half the states for over twenty-five years, Gregory personally knows of "only three buildings in the country that were actually designed and built for the alternative schools they now house." This situation must change, since alternatives need new forms of space and a fair share of infrastructure resources (not simply funding for teacher salaries) to educate their students appropriately.

Alternatives also need to build in program integrity and completeness and rely on graduation for closure, instead of sending newly productive kids back to an unsupportive, big-school ambience. Gregory says alternative educators should not hesitate to use brashness, effrontery, and subversive behavior as weapons for jumpstarting the change process.

Sharing Gregory's and Raywid's concerns about equity and diversity, Jerry Conrath (2001) believes "alternative education can become a catalyst for America's unrealized hopes" by "helping young people overcome their most debilitating handicaps: the rampant pessimism, the failure to trust in effort, and the lack of confidence in our institutions due to generational poverty."

For Conrath, the secret weapon for developing successful youth is to teach them internal self-control and the value of effort in the face of adversity. Alternative educators can't guarantee success for every youngster (since they do not control family and economic circumstances), but they can promise to aid and encourage a struggling student in whatever way possible.

Alternative schools must lose their punitive stigma and adopt more open-door policies that welcome all school community members and attract interested students, according to an alternative high school director in Indiana (McGee 2001). Graduates should not be ashamed to list an alternative-school experience on their employment resumes or college applications.

Hamilton Alternative School's "Dangerous Minds" image, complete with visions of druggies, gangstas, and social outcasts, partly evaporated after reporters visited classrooms and shadowed "typical" students pursuing varied learning activities in a warm, inviting environment (McGee 2001). The school is well-funded and -appointed, but has had mixed success, as only half the student body completed the 1999-2000 school year. Some students could not be reached or engaged by Hamilton's programs. McGee's experience there convinced him that "options-loaded" alternative schools are so necessary that they should have more inviting names and identifiable missions.

Debra Meier, a well-known leader in New York City's (public-sector) small-schools movement, argues that students at the Central Park East schools she created in the mid-1970s are as at-risk as those in larger public schools, but "they are more likely to get a high school diploma and go on to successful college careers" (Meier 2000). She says, "schools for low-income students are more successful when they are small, when parents and teachers are together by choice," when schooling approaches are strong, coherent,

and community-minded, and when adults use their authority to make major decisions—all possible "inside the public sector, without charters, vouchers, or privatization."

Meier also believes the assessments that most small schools rely on (oral defenses, portfolios, and exhibitions) are more reliable indicators of future real-life success than the standardized tests used to evaluate students' progress in most schools. Meier's observations and experiences are reflected in the practices of alternative-school educators in both private and public sectors.

## Early College Connections

Thanks to a growing number of cooperative programs involving schools and colleges, alternative placements do not have to be confined to K-12 classrooms. The University of California and California State University System "are working with school districts as never before to boost the readiness of minority students for academic work" at the college level (Maeroff and others 2000).

Similar partnerships in El Paso, Texas, and Memphis, Tennessee, seek to replicate the success of New York City's Middle College High School. This concept attempts to equalize opportunities for high-risk youngsters, as in its prototype—the City University of New York's LaGuardia Community College (Maeroff and others 2000).

Two other New York City programs are noteworthy. In June 2001, New York City's Board of Education approved Bard College's plan to start a public "early college" that would allow students to bypass a high-school diploma and earn an associate-arts degree (Reid, June 13, 2001). Students at the new Bard school in Annandale-on-Hudson would be taught a liberal-arts college education by professors with deep connections to their subject matter. Students (ninth- and eleventh-graders first) will be admitted on the basis of application, interviews, and portfolios (not standardized test scores). Funding would come from state, local, and privately raised dollars.

A four-year-old partnership between Harlem's Frederick Douglass Academy (80 percent African-American) and Ithaca College in upstate New York is also reaching out to youngsters who might never have considered going to college (Gehring 2001). Small groups of middle-schoolers are bused to graduation ceremonies, musical programs, and campus treasure hunts, while older kids attend math and computer programs at Ithaca during summer and work with Ithaca faculty members at their own school—adding up to enriching experiences for all concerned

## **Conclusions and Policy Implications**

Previous sections have described numerous programs and formats that characterize the immensely varied school-choice movement:

- residential schools for able, disaffiliated youth in a few cities
- career magnets, "last-chance" charters, and small, community-minded alternative schools as anodynes to large, impersonal high schools
- African-American and Latino immersion schools
- private-school scholarships for inner-city children
- plans to revitalize controlled-choice experiments by substituting socioeconomic integration initiatives for less successful racial desegregation efforts in Maryland, Wisconsin, North Carolina, and Connecticut inner cities
- programs such as the Algebra Project in Cambridge that use a subject discipline to expand innercity youth's educational aspirations and occupational/life choices
- cyber charter-school and home-school courses for learners who don't function well in traditional classroom settings
- early college introduction/entrance programs designed for disadvantaged and/or intellectually curious middle-school and high-school youngsters

Clearly, the school-choice movement is giving birth to a wide range of learning opportunities with stunning diversity in academic goals and methods, target populations, and social responsiveness.

Three general, overarching conclusions may be drawn from the above research summaries: (1) Pressures for choice in American education are deeply rooted and here to stay; (2) further discussion is needed on the benefits and merits of various choice alternatives; and (3) more research studies are needed to judge results, enlighten discussion, and inform policy.

## **How Best To Achieve the Common Good?**

Two central questions dominate the debate over school choice: (1) Should markets determine the character of public education? and (2) If markets rule, who will champion the common good?

On one side are voices claiming that strong public schools are so essential for the common good that any kind of school choice that might weaken public schools should be discouraged. Peter Cookson, Amy Gutmann, and Jeffrey Henig contend that "in a democracy, representative institutions such as school boards should run the schools in the interest of the whole society, to ensure social equity" (Gresham and others 2000). Historian and educator Larry Cuban echoes those views in an interview (O'Neil 2000), insisting that a consumer-driven, supermarket approach to education nullifies public schools' purpose—"to develop citizens who care for a community and can contribute to it."

Diane Ravitch (2001) worries that choice and multiculturalism will further "undermine our society's shared culture" and erode schools' assimilative role for new immigrants who will eventually become Americans. She points out that some public schools today have no American flag, no Pledge of Allegiance, and no patriotic or traditional songs. Is it possible, she asks, to teach the "best" of a common culture while celebrating diversity and allowing school choice based on particular cultural needs?

Market advocates dispute the notion that choice is counter to the common good and point to the inherent value of parents' and students' freedom to choose the schools they attend. Milton Friedman, John Chubb, and Terry Moe claim "parents should have the preeminent role in determining their children's education, in part since their choices will broaden social goals" (Gresham and others 2000). Joseph Viteritti (2000) and Robert DeBlois (2000) argue that the choice movement's fairness and varied options justify its persistence. As Viteritti observes, "in the end choice constitutes good public policy because it is fair, not because its effects are measurable by academicians" who refuse to share decisions about where to educate their own children.

Nathan Glazer (2001) argues that the shifting makeup of society has already undermined the common culture via segregated urban neighborhoods and schools, multicultural perspectives that weren't present forty years ago, and legal decisions that have eroded public-school educators' authority "to create and pass on a common [school] culture—its rules, its expectations of behavior, its sanctions." In fact, says Glazer, private schools' "relative freedom from rules and regulations... has enhanced their relative ability, vis-à-vis the public schools, to transmit the common culture that we all took for granted a few decades ago."

## **Lessons and Policy Directions**

From their comprehensive study of choice in mostly California schools for Policy Analysis for California Education (PACE), Bruce Fuller and associates (1999) formulated some major lessons: (1) information for parents to judge school quality is scarce; (2) alternative schools' actual costs are variable and often accompanied by unfair financing; (3) public accountability mechanisms are loose and uninformed; (4) local schools rarely learn from choice experiments; (5) inequities mark which families become choosers or nonchoosers; (4) and evidence on student achievement is scarce and mixed.

Fuller and colleagues (1999) recommend four steps to strengthen equity: (1) build a consensus among advocates (legislatures, education departments, school boards, foundations, and individual donors) about basic principles and pathways; (2) develop simple consumer information; (3) design program "details" to target most economically vulnerable families, select participating children fairly, distribute funding equitably, and hold alternative schools accountable; and (4) initiate longitudinal tracking of student migration.

The public has must have access to full information about the programs available and their performance. PACE researchers recommend that government and foundations pilot

"simple consumer information" for a set of schools, "including each school's discrete ability to boost parental involvement, raise children's learning curves, and lower dropout rates over time" (Fuller and others 1999). Experts agree that informing and welcoming parents of diverse backgrounds should be at the heart of any choice endeavor.

The PACE report also recommends that programs target those families who possess the fewest school-choice options and select children via a lottery system (to reduce inadvertent sorting into high- and low-quality schools). PACE researchers join many experts in recommending that sponsoring agencies, districts, and states assess actual program costs, allocate funds equitably, and "hold alternative schools strictly accountable."

Michael Mintrom (2000) recommends that policymakers consider several options that could increase innovative practices: instituting incentive programs rewarding both charter and traditional public schools for developing promising new practices; creating a well-funded central information exchange to encourage cooperation between alternative and traditional schools; and minimizing the additional administrative responsibilities put on schools.

At this point, no one knows which school-choice options have the best chance of survival in the new century. If Larry Cuban is correct, the most consistently popular, practical, and equitable experiments will prevail. If economist Harry Levin is right (Goldberg 2001), freedom of choice, productive efficiency, equity, and social cohesion will become recognized as "best criteria" for judging school-choice alternatives and putting them into practice.

The last two determinants (equity and social cohesion) may help decision-makers tackle what Levin calls the greatest problem in education—bringing "youngsters at the low end into the mainstream of American life" regardless of parental background, immigrant status, or disillusionment with "the system." This ambitious goal might remain elusive, if, as Nathan Glazer suggests, the school-choice movement continues to foster "a greater commitment to freedom than equality" (2001).

David Plank and Gary Sykes (2000), in their analysis of Michigan school-choice systems, conclude that "the challenge for policy-makers is to design a framework for school choice policy that harnesses the power of markets to improve educational opportunities while protecting against the harm that simply 'unleashing' markets can do. This will require careful attention to the alignment between rules, incentives, and the goals of educational policy."

Many advocates employ "wise investment" arguments, claiming that spending a dollar on Head Start today will beat the thousands of dollars required to incarcerate the delinquent or criminal of tomorrow (Kozol 2000). Both Jonathan Kozol and Gerald Bracey (1997) would like policymakers and advocates to recast poor kids in a less utilitarian light—not as future entry-level workers, but as children who deserve a rewarding education and a

decent childhood. Fortunately, the school-choice movement offers policymakers ample opportunity to exercise their compassion and creativity.

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